

# **Business Objects**

**Queries and Reports for  
CMS Net and CCS Claims**

Introduction/Background .....	4
Business Objects Passwords .....	4
Opening Business Objects and Running a Corporate Document.....	5
Saving the Report as Excel, Adobe PDF, or Comma Separated Values (CSV).....	7
Eligibility (CMS Net) Corporate Documents .....	8
CMS 01 – All Active Cases.....	8
CMS 02 – All Referrals (0-30, 31-60, 61-90, Over 90).....	10
CMS 03 – 21 Report (Cases Turning 21 Next Month, Cases Over 21) .....	12
CMS 04 – Age Report (Cases Turning 14, 16, 18, 20 Next Year) .....	14
CMS 05 – Medical Home Report .....	16
CMS 06 – Medi-Cal and HF Lapsed .....	19
9N clients with no Medi-Cal Number .....	20
9R clients with no Medi-Cal Number .....	21
9U clients with no Medi-Cal Number .....	22
9K clients with no Medi-Cal Number .....	23
CMS 07 – Healthy Families Caseload Count.....	24
Active HF .....	24
Pending HF .....	25
Report .....	26
CMS 08 – Healthy Families Plan List Per Client.....	27
CMS 09 – Count of Active Clients by First Ltr of Last Name .....	29
CMS 10 – MTU Client Count by ZIP Code .....	31
CMS 11 – Cases Closed Due to Death of Client .....	33
CMS 12 – Active Clients Assigned to a MTU.....	34
CMS 13 – Address Labels (Instructions on second tab) .....	36
CMS 14 – Active Pending Counts and List .....	37
Active and Pending Count by Case Status, Funding Source .....	37
Active and Pending Count by Funding Source, Case Status .....	39
Active List.....	41
Pending List .....	42
CMS 15 – Referral Counts and List (Prompt) .....	43
CMS 16 – Cases Between an Age Range (Prompt) .....	45
CMS 17 – Active Pending Diagnoses Counts and List (Prompt) .....	47
Active Pending Cases Diagnoses Counts.....	47
Active Pending Cases Diagnoses Listing.....	49
CMS 18 – Count of Active Pending Cases by Diagnosis.....	51
CMS 19 – Active Pending Cases by County Case Manager .....	52
CMS 20 – Case Count Report .....	54
CMS 21 - Primary Care Providers (Medical Homes) .....	56
Claims (CCS Claims) Corporate Documents .....	57
Expenditures (by CIN) .....	57
Expenditures (by Provider Number, Date of Service) .....	59
Expenditures (by SAR Number) .....	61
Procedure Codes by Funding Source (by Payment Date, Procedure Code) .....	63
Expenditures Detail Report (by Payment Date, First Ltr of Last Nm).....	65

Paid Claims by Funding Source - Summary Report (by Payment Date).....	67
Expenditures (by CCN).....	69

## Introduction/Background

Business Objects is the software gateway for accessing data through a secured site on the Internet. The State Department of Health Care Services (DHCS) has developed two reporting systems that enable you to view **CMS Net Eligibility Reports** and **CCS Paid Claims** through Business Objects.

To use Business Objects you need, at a minimum, access to the Internet and Microsoft Internet Explorer Version 6.0.

- County users connect to the DHCS Extranet site  
<https://portal.dhcs.ca.gov/businessobjects/enterprise115/InfoView/logon.aspx>
- State users connect to the DHCS Intranet site  
<http://dhssacbi02/businessobjects/enterprise115/InfoView/logon.aspx>
- You will also need a Business Objects User ID and Password issued by the State. To obtain a password, please fill out [DHCS 4074](#) on the [CMS Net Website](#).

The number of reports through this reporting site will continue to grow based on program needs and your feedback.

## Business Objects Passwords

The Business Objects password instruction document has instructions for setting a new password and changing an existing one. It is located at <http://www.dhcs.ca.gov/services/ccs/cmsnet/Documents/BOPasswordInst.pdf>.

# Opening Business Objects and Running a Corporate Document

Type your User name and Password, and then click Log on.



Log On to InfoView

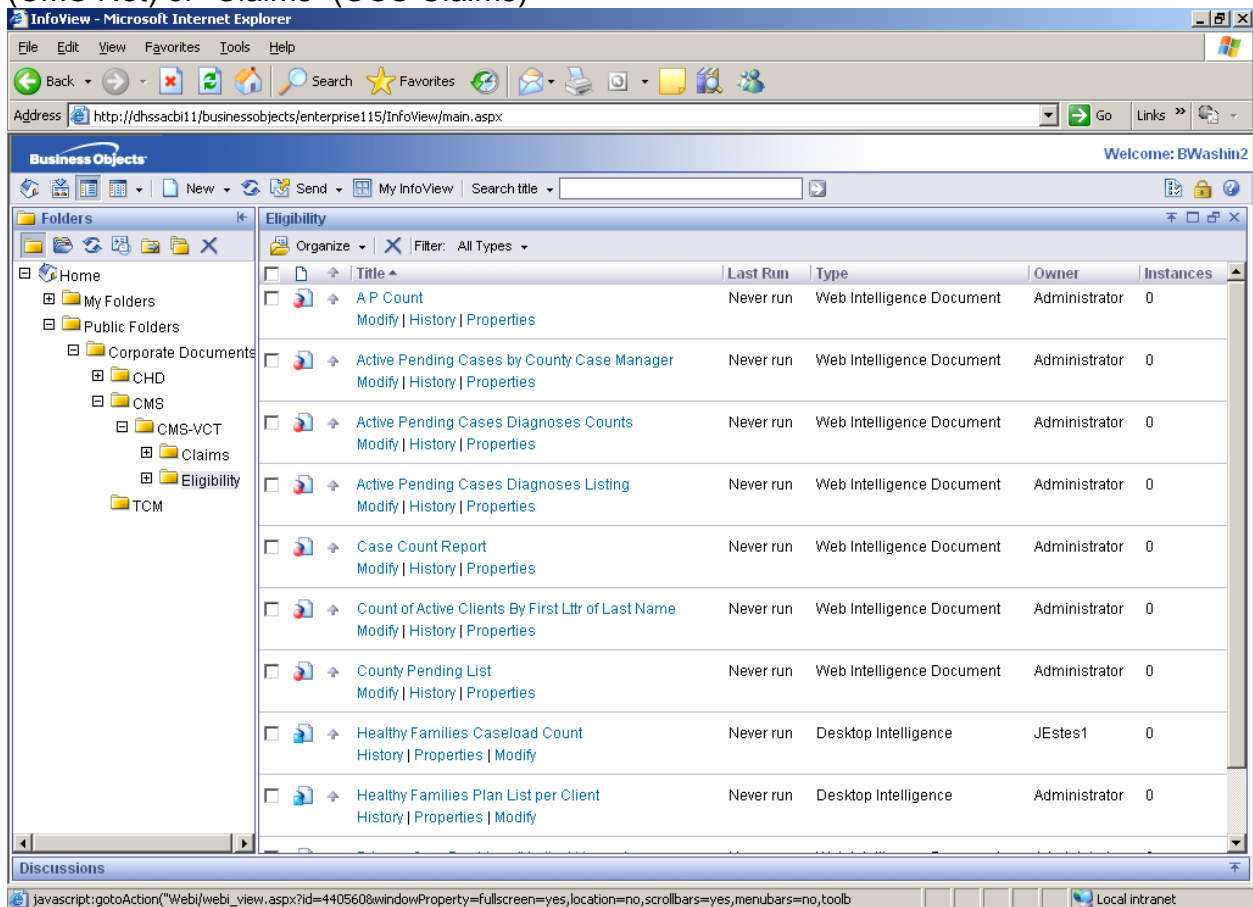
Welcome to BusinessObjects

Enter your user information and click Log On.  
(if you are unsure of your account information, contact your system administrator)

User name:

Password:

Click on “Public Folders,” then “Corporate Documents,” then “CMS,” then “Eligibility” (CMS Net) or “Claims” (CCS Claims)



InfoView - Microsoft Internet Explorer

Address: <http://dhssacbi11/businessobjects/enterprise115/InfoView/main.aspx>

Welcome: BWashin2

**Business Objects**

Organize | Filter: All Types

Title	Last Run	Type	Owner	Instances
<input type="checkbox"/> A P Count <a href="#">Modify</a>   <a href="#">History</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document	Administrator	0
<input type="checkbox"/> Active Pending Cases by County Case Manager <a href="#">Modify</a>   <a href="#">History</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document	Administrator	0
<input type="checkbox"/> Active Pending Cases Diagnoses Counts <a href="#">Modify</a>   <a href="#">History</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document	Administrator	0
<input type="checkbox"/> Active Pending Cases Diagnoses Listing <a href="#">Modify</a>   <a href="#">History</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document	Administrator	0
<input type="checkbox"/> Case Count Report <a href="#">Modify</a>   <a href="#">History</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document	Administrator	0
<input type="checkbox"/> Count of Active Clients By First Ltr of Last Name <a href="#">Modify</a>   <a href="#">History</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document	Administrator	0
<input type="checkbox"/> County Pending List <a href="#">Modify</a>   <a href="#">History</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document	Administrator	0
<input type="checkbox"/> Healthy Families Caseload Count <a href="#">History</a>   <a href="#">Properties</a>   <a href="#">Modify</a>	Never run	Desktop Intelligence	JEstes1	0
<input type="checkbox"/> Healthy Families Plan List per Client <a href="#">History</a>   <a href="#">Properties</a>   <a href="#">Modify</a>	Never run	Desktop Intelligence	Administrator	0

Discussions

javascript:gotoAction("Webi/webi\_view.aspx?id=440560&windowProperty=fullscreen=yes,location=no,scrollbars=yes,menubars=no,toolb

Local intranet

Click on the title of the report you want to run. Business Objects may ask you to enter additional information about the report you want to run, or it will simply run the report.

InfoView - Microsoft Internet Explorer

Address: <http://dhssacbi11/businessobjects/enterprise115/InfoView/main.aspx>

Welcome: BWashin2

**Folders**

- Home
  - My Folders
  - Public Folders
    - Corporate Documents
      - CHD
      - CMS
        - CMS-VCT
          - Claims
          - Eligibility
        - TCM

**A/P Count**

Case Status	Participant Count
ACTIVE	12,598
PENDING	809
REOPEN PENDING	124
<b>Sum:</b>	<b>13,531</b>

Last Refresh: 8/28/08 3:45:06 PM

Discussions

Done Local intranet

To run another report, click the “Claims” or “Eligibility” folder on the left hand side of the screen, then choose another report to run.

## Saving the Report as Excel, Adobe PDF, or Comma Separated Values (CSV)

Saving a report will open the report in a new window. Some users will not see the new window- this is because of Internet Explorer settings, not Business Objects. If you do not see a new window, please contact your local IT and get their assistance in changing your browser permissions.

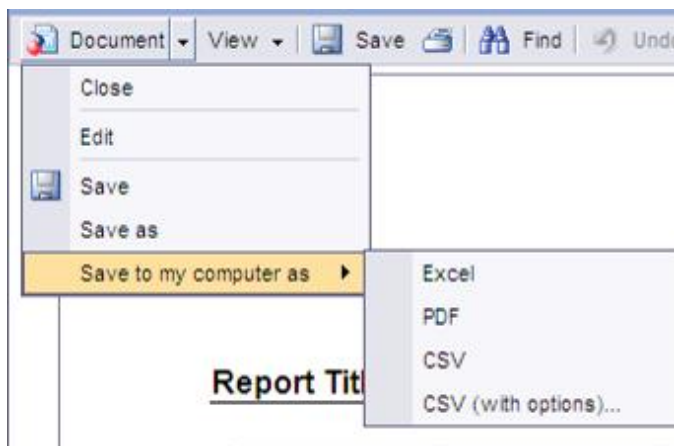
If the report disappears from the screen and you are taken to the beginning Business Objects welcome screen when trying to save, simply navigate to the report and try again. This occasionally occurs when you try to save the report, but should not happen twice in a row.

The following corporate documents will default to opening as Adobe PDF format. You can click the “View in HTML format” button to save the report as Excel or CSV.

- CMS 07 – Healthy Families Caseload Count
- CMS 08 – Healthy Families Plan List per Client
- CMS 10 – MTU Client Count by ZIP Code
- CMS 11 – Cases Closed Due to Death of Client

Open the report in “View” mode

Click the down arrow next to the “Document” icon on the toolbar



Highlight “Save to my computer as...” and click either Excel, PDF, or CSV

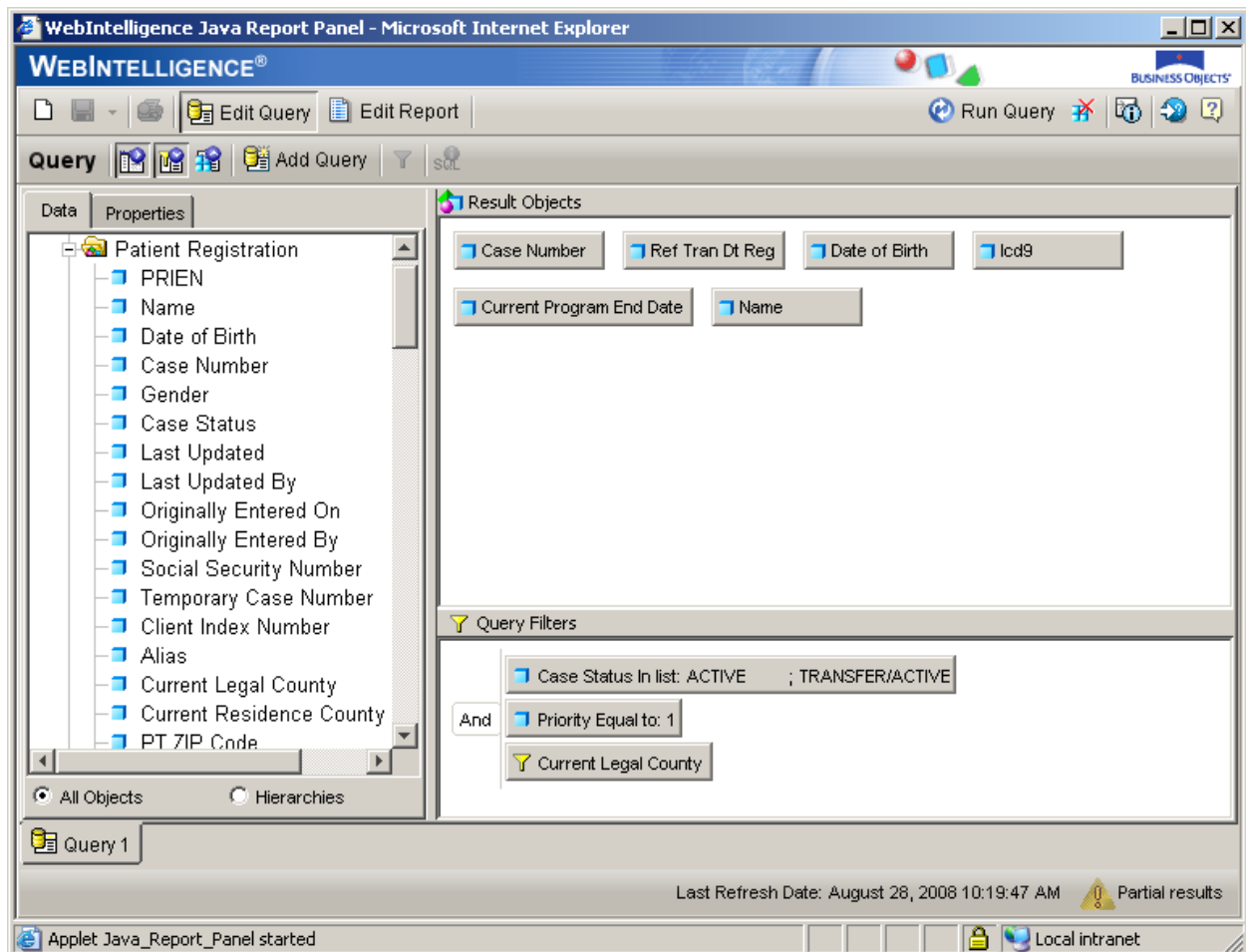
## Eligibility (CMS Net) Corporate Documents

All reports automatically refresh with data as of yesterday in CMS Net unless otherwise stated.

### ***CMS 01 – All Active Cases***

Lists all active cases in the county, sorted by last name.

Prompt: None





### All Active Cases

Name	Case Number	Date of Birth	Current Referral Date	Current Program End Date	Icd9
CLIENT NAME	CASE #	DOB	06/04/2003	05/31/2009	555.9
CLIENT NAME	CASE #	DOB	06/05/2003	01/30/2009	344.9
CLIENT NAME	CASE #	DOB	06/06/2003	02/10/2009	424.3
CLIENT NAME	CASE #	DOB	06/07/2003	05/31/2009	496
CLIENT NAME	CASE #	DOB	06/08/2003	06/20/2009	749.10
CLIENT NAME	CASE #	DOB	06/09/2003	07/11/2009	343.2
CLIENT NAME	CASE #	DOB	06/10/2003	05/12/2009	755.61
CLIENT NAME	CASE #	DOB	06/11/2003	03/13/2009	330.0
CLIENT NAME	CASE #	DOB	06/12/2003		269.8
CLIENT NAME	CASE #	DOB	06/13/2003	02/09/2009	286.0
CLIENT NAME	CASE #	DOB	06/14/2003	11/22/2008	389.9
CLIENT NAME	CASE #	DOB	06/15/2003		344.30
CLIENT NAME	CASE #	DOB	06/16/2003	11/09/2008	767.6
CLIENT NAME	CASE #	DOB	06/17/2003	08/27/2009	378.00
CLIENT NAME	CASE #	DOB	06/18/2003		343.2
CLIENT NAME	CASE #	DOB	06/19/2003		752.61
CLIENT NAME	CASE #	DOB	06/20/2003	01/28/2009	755.64
CLIENT NAME	CASE #	DOB	06/21/2003		770.89
CLIENT NAME	CASE #	DOB	06/22/2003		283.9

**Total: 19**

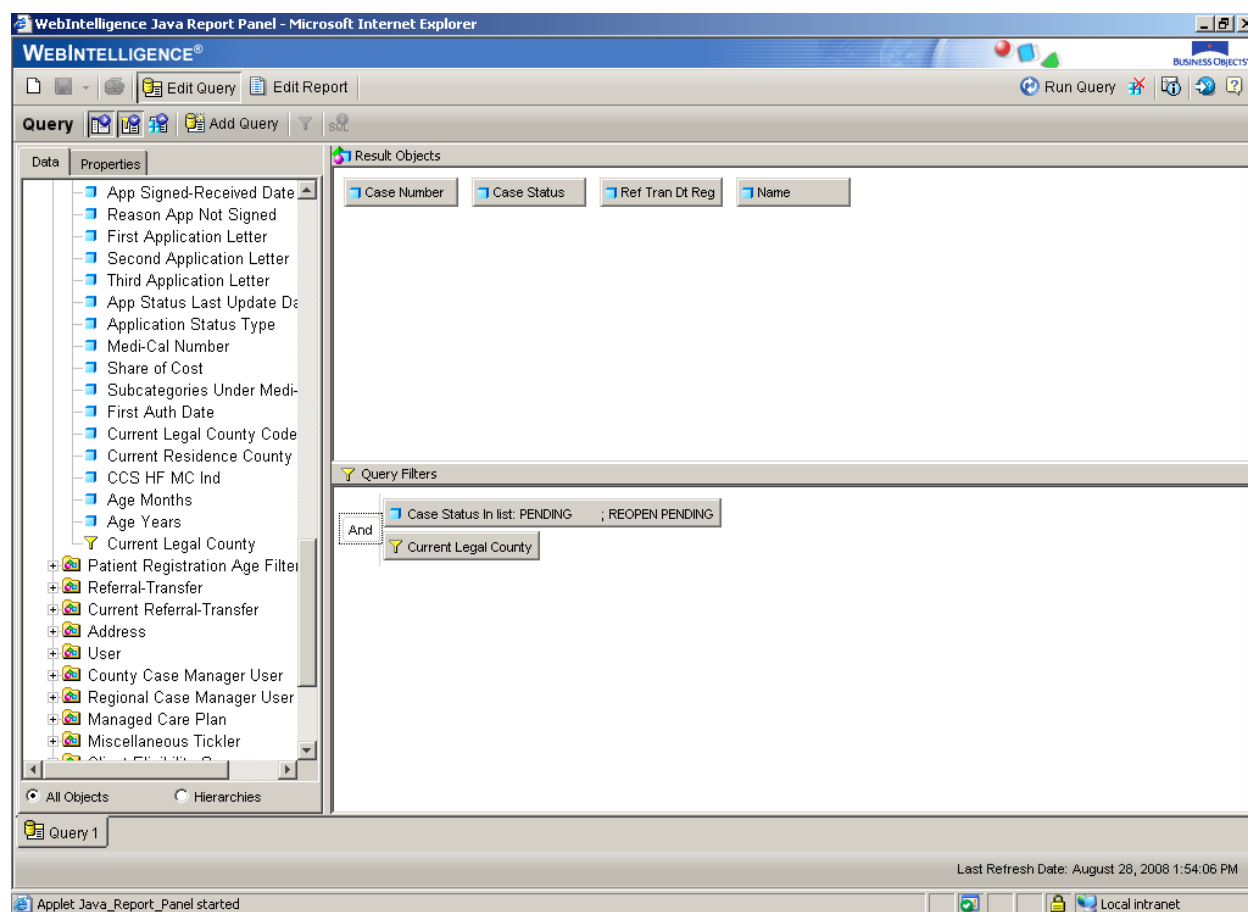
## ***CMS 02 – All Referrals (0-30, 31-60, 61-90, Over 90)***

This report lists all clients in a pending or reopen pending status. It groups clients by the number of days between the referral and today's date.

Four tabs are included in this report:

- 0-30
- 31-60
- 61-90
- Over 90

Prompt: None



**All Referrals 0-30 Days**

<b>Referral Date</b>	<b>Case Number</b>	<b>Case Status</b>	<b>Name</b>
07/29/2008	CASE #	PENDING	CLIENT NAME
07/29/2008	CASE #	PENDING	CLIENT NAME
07/29/2008	CASE #	PENDING	CLIENT NAME
07/30/2008	CASE #	REOPEN PENDING	CLIENT NAME
07/30/2008	CASE #	PENDING	CLIENT NAME
07/30/2008	CASE #	PENDING	CLIENT NAME
08/01/2008	CASE #	PENDING	CLIENT NAME
08/01/2008	CASE #	PENDING	CLIENT NAME
08/01/2008	CASE #	PENDING	CLIENT NAME
08/04/2008	CASE #	REOPEN PENDING	CLIENT NAME
08/04/2008	CASE #	PENDING	CLIENT NAME
08/04/2008	CASE #	PENDING	CLIENT NAME
08/04/2008	CASE #	PENDING	CLIENT NAME
08/04/2008	CASE #	PENDING	CLIENT NAME
08/04/2008	CASE #	PENDING	CLIENT NAME
08/04/2008	CASE #	PENDING	CLIENT NAME
08/05/2008	CASE #	PENDING	CLIENT NAME
08/06/2008	CASE #	REOPEN PENDING	CLIENT NAME

**Total:**                      **18**

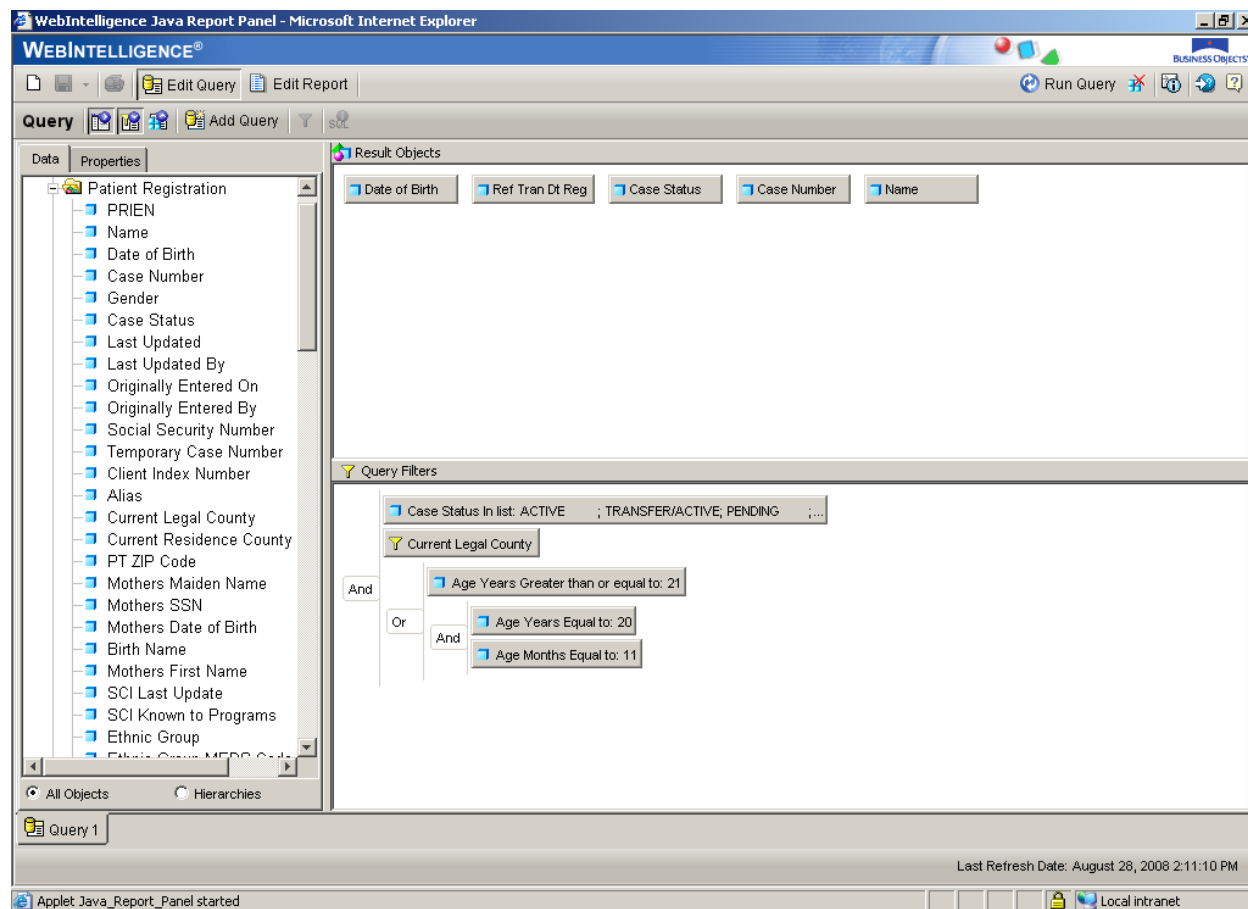
## ***CMS 03 – 21 Report (Cases Turning 21 Next Month, Cases Over 21)***

This report lists all clients turning 21 in the next month and clients over age 21.

Two tabs are included in this report:

- Turning 21 Next Month
- Over 21

Prompt: None



8/28/08 2:13 PM

### Cases Turning 21 Next Month

Name	Date of Birth	Case Number
CLIENT NAME	DOB	CASE #
CLIENT NAME	DOB	CASE #

Total: 2

8/28/08 2:13 PM

### Cases Over 21

Name	Date of Birth	Case Number	Ref Tran Dt Reg
CLIENT NAME	DOB	CASE #	05/03/1988
CLIENT NAME	DOB	CASE #	05/26/1992
CLIENT NAME	DOB	CASE #	08/08/1995
CLIENT NAME	DOB	CASE #	04/23/2007
CLIENT NAME	DOB	CASE #	08/07/2007
CLIENT NAME	DOB	CASE #	02/07/2008
CLIENT NAME	DOB	CASE #	05/13/2008
CLIENT NAME	DOB	CASE #	06/02/2008
CLIENT NAME	DOB	CASE #	07/14/2008
CLIENT NAME	DOB	CASE #	08/01/2008
CLIENT NAME	DOB	CASE #	08/07/2008

Total: 11

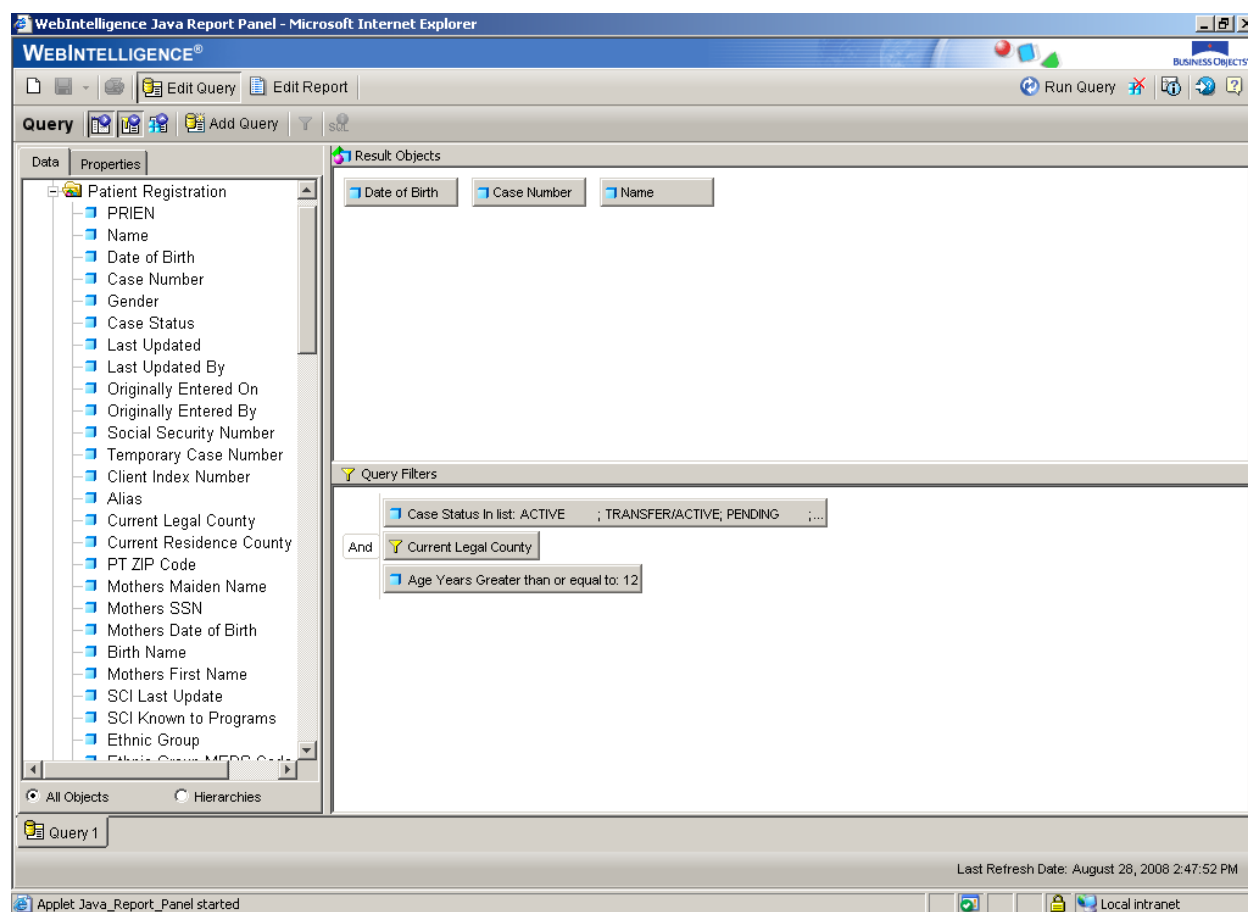
## ***CMS 04 – Age Report (Cases Turning 14, 16, 18, 20 Next Year)***

This report lists all active and pending clients that are turning 14, 16, 18, and 20 next year. This report is used for transition planning.

Four tabs are included in this report:

- Turning 14 Next Year
- Turning 16 Next Year
- Turning 18 Next Year
- Turning 20 Next Year

Prompt: None



**Cases Turning 14 Next Year**

<b>Case Number</b>	<b>Name</b>	<b>Date of Birth</b>
CASE #	CLIENT NAME	09/13/1995
CASE #	CLIENT NAME	09/14/1995
CASE #	CLIENT NAME	09/15/1995
CASE #	CLIENT NAME	12/20/1994
CASE #	CLIENT NAME	12/21/1994
CASE #	CLIENT NAME	12/22/1994
CASE #	CLIENT NAME	12/23/1994
CASE #	CLIENT NAME	12/24/1994
CASE #	CLIENT NAME	12/25/1994
CASE #	CLIENT NAME	10/30/1994
CASE #	CLIENT NAME	10/31/1994
CASE #	CLIENT NAME	11/01/1994
CASE #	CLIENT NAME	11/02/1994
CASE #	CLIENT NAME	11/03/1994

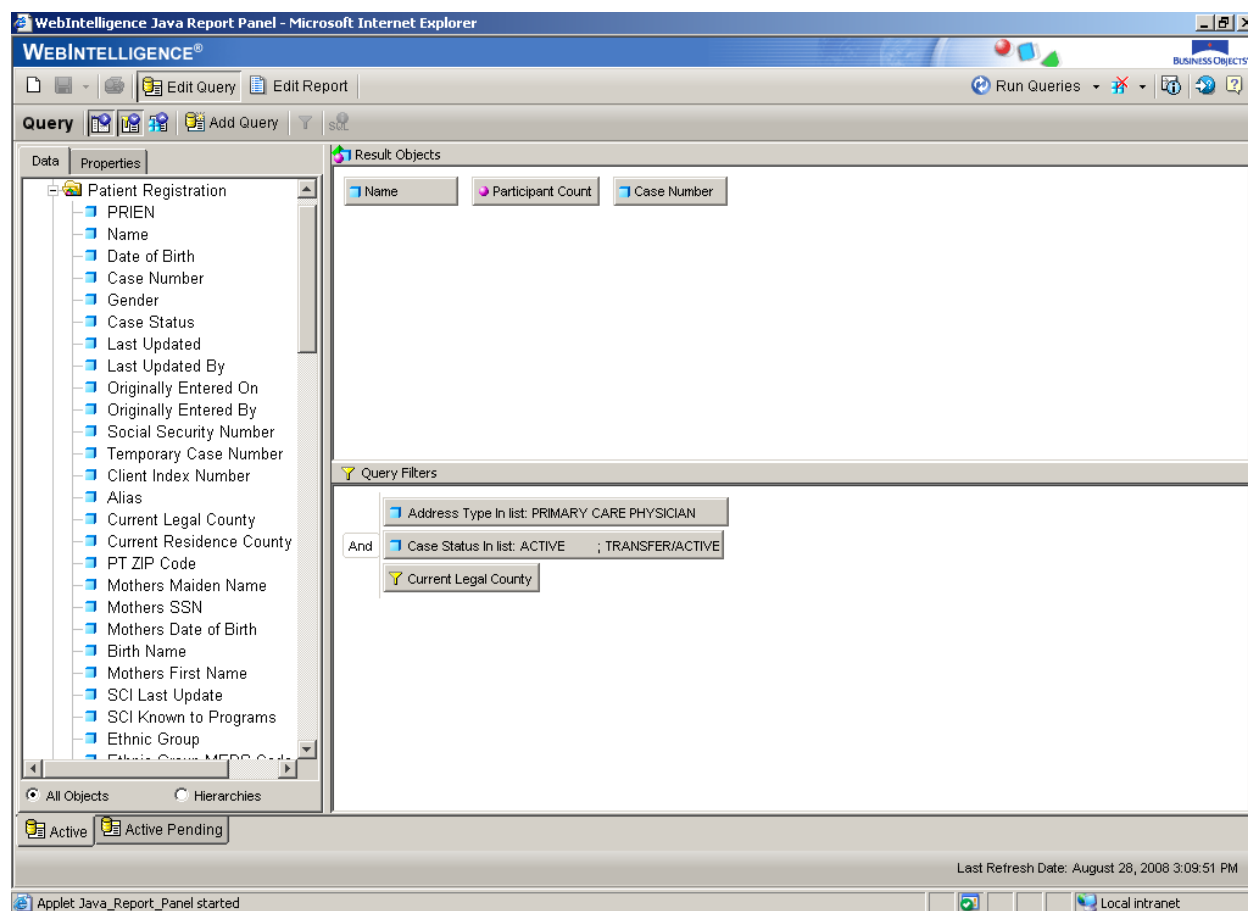
**Total: 14**

## CMS 05 – Medical Home Report

Two tabs are included in this report:

- Count of Active Cases With A Medical Home - A list of all Medical Homes and how many active clients are assigned to the Medical Home, and
- Active Pending Medical Home Detail - A list of all active and pending clients with their Medical Home listed. If the Medical Home is blank, the client is not assigned to a Medical Home. Blank medical homes are grouped at the top of the report.

Prompt: None





## Count of Active Cases with a Medical Home

2,220 Providers

8,318 Active Cases with a Medical Home

Medical Home	Total Clients
AARON ZAHEER MD	1
AARON ZAHEER, MD	1
ABELL, GOEFFREY MD	1
ARGOUD,GEORGES M MD	3
ARGOUD MD,DR.GEORGES	1
BUCHTA RICHARD M MD	1
BUCHTA, RICHARD M MD	1
CHILDREN'S PRIMARY CARE MEDICAL GROUP	16
PICKERING, BRETTEN MD	180
ZANDKARIMI MD, FARIBA	11

WebIntelligence Java Report Panel - Microsoft Internet Explorer

**WEBINTELLIGENCE®**

Edit Query Edit Report Run Queries

**Query** Add Query

**Data** Properties

- Patient Registration
  - PRIEN
  - Name
  - Date of Birth
  - Case Number
  - Gender
  - Case Status
  - Last Updated
  - Last Updated By
  - Originally Entered On
  - Originally Entered By
  - Social Security Number
  - Temporary Case Number
  - Client Index Number
  - Alias
  - Current Legal County
  - Current Residence County
  - PT ZIP Code
  - Mothers Maiden Name
  - Mothers SSN
  - Mothers Date of Birth
  - Birth Name
  - Mothers First Name
  - SCI Last Update
  - SCI Known to Programs
  - Ethnic Group
  - Ethnic Group MEDC Code

☐ All Objects ☐ Hierarchies

**Result Objects**

Name Name Case Number CCS HF MC Ind Case Status Participant Count Address Type

**Query Filters**

Address Type In list: PRIMARY CARE PHYSICIAN ; PRIMARY

And Case Status In list: ACTIVE ; TRANSFER/ACTIVE, PENDING ; ...

Current Legal County

Active Active Pending

Last Refresh Date: August 28, 2008 3:09:51 PM

Applet Java\_Report\_Panel started BusinessObjects InfoView - Microsoft Internet Explorer Local intranet

### Active Pending Medical Home Detail

13      Active Cases  
2      Pending Cases

CASE #	CLIENT NAME	FIN INDICATOR	MEDICAL HOME	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	MC		PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS		PRIMARY ADDRESSEE
CASE #	CLIENT NAME	MC		PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	UNKNOWN PCP	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	MC	ZANDKARIMI MD, FARIBA	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	MC	ZAHEER, AARON MD	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	RASMUSSEN, BRUCE	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	UNKNOWN PRIMARY CARE M.D.	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	WU, VEDA MD	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	NORTH COUNTY HEALTH SERVICES CARLSE	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	SCHWARTZ MD, ALLEN	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	MC	WOSK, BERNARD MD	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	SANCHEZ MD, CARLOS	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	LA MAESTRA FAMILY CLINIC	PRIMARY ADDRESSEE
CASE #	CLIENT NAME	CCS	UNKNOWN PCP	PRIMARY ADDRESSEE

### ***CMS 06 – Medi-Cal and HF Lapsed***

This report pulls cases with lapsed Medi-Cal or Healthy Families.

This report has four tabs:

- 9N clients with no Medi-Cal Number
- 9R clients with no Medi-Cal Number
- 9U clients with no Medi-Cal Number
- 9K clients with no Medi-Cal Number

The Medi-Cal number field identifies a case as a Medi-Cal case, a Healthy Families case, or a CCS only case.

Prompt: None

## 9N clients with no Medi-Cal Number

CCS 06 - Medi-Cal and HF Lapsed

Run Queries

Data Properties

Result Objects

Name Case Number Date of Birth Current CCS Elig Status Medi-Cal Number User Name

Query Filters

Case Status Equal to ACTIVE

Current CCS Elig Status Equal to 9N M/C ONLY

Medi-Cal Number Equal to null

Current Legal County

9N 9R 9U 9K

## 9N MC LAPSED

Name	Case Number	Date of Birth	Medi-Cal Number	Regional Office Case Mgr
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
Count:	15			

## 9R clients with no Medi-Cal Number

CCS 06 - Medi-Cal and HF Lapsed

Edit Query Edit Report Run Queries

Add Query

Data Properties

Result Objects

Name Case Number Date of Birth Current CCS Elig Status Medi-Cal Number User Name

Query Filters

Case Status Equal to ACTIVE

Current CCS Elig Status Equal to 9R HF OVER FIN ELIG

Medi-Cal Number Equal to null

Current Legal County

And

9N 9R 9U 9K

Last Refresh Date: April 29, 2009 11:07:53 AM

## 9R HF LAPSED

Name	Case Number	Date of Birth	Medi-Cal Number	User Name
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
Count:	15			

## 9U clients with no Medi-Cal Number

CCS 06 - Medi-Cal and HF Lapsed

Edit Query Edit Report Run Queries

Add Query

Data Properties

Result Objects

Name Case Number Date of Birth Current CCS Elig Status Medi-Cal Number User Name

Query Filters

Case Status Equal to ACTIVE

Current CCS Elig Status Equal to 9U HF ELIG NOT COMPL

Medi-Cal Number Equal to null

Current Legal County

All Objects Hierarchies

9N 9R 9U 9K

Last Refresh Date: April 29, 2009 11:07:53 AM

## 9U HF LAPSED

Name	Case Number	Date of Birth	Medi-Cal Number	User Name
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
Count:	15			

## 9K clients with no Medi-Cal Number

CCS 06 - Medi-Cal and HF Lapsed

Run Queries

Data Properties

Result Objects

Name Case Number Date of Birth Current CCS Elig Status Medi-Cal Number User Name

Query Filters

Case Status Equal to ACTIVE

Current CCS Elig Status Equal to 9K CCS

Medi-Cal Number Equal to null

Med Elig Dx Only Equal to NO

Application Status Type In list HF ;MEDI-CAL

Current Legal County

All Objects Hierarchies

9N 9R 9U 9K

Last Refresh Date: April 29, 2009 11:07:53 AM

## 9K MC OR HF LAPSED

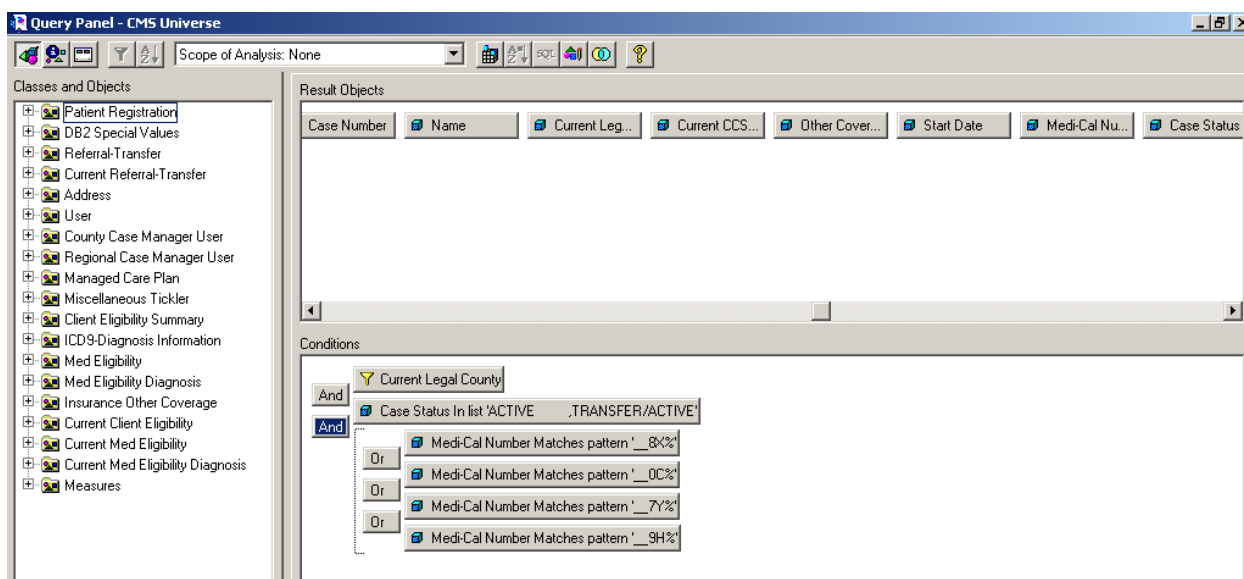
Name	Case Number	Date of Birth	Medi-Cal Number	User Name
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
CLIENT NAME	CASE #	DOB		CASE MGR
Count:	15			

## CMS 07 – Healthy Families Caseload Count

List of Healthy Families clients by Active or Pending case status. Count of total active and total pending clients included in report. Healthy Families status is pulled using the aid code from the Medi-Cal number. **Use this count for performance measure reporting.**

Prompt: None

### Active HF





## Pending HF

Query Panel - CMS Universe

Scope of Analysis: None

Classes and Objects

- Patient Registration
- DB2 Special Values
- Referral-Transfer
- Current Referral-Transfer
- Address
- User
- County Case Manager User
- Regional Case Manager User
- Managed Care Plan
- Miscellaneous Tickler
- Client Eligibility Summary
- ICD9-Diagnosis Information
- Med Eligibility
- Med Eligibility Diagnosis
- Insurance Other Coverage
- Current Client Eligibility
- Current Med Eligibility
- Current Med Eligibility Diagnosis
- Measures

Result Objects

Case Number	Name	Current Leg...	Current CCS...	Other Cover...	Start Date	Medi-Cal Nu...	Case Status
-------------	------	----------------	----------------	----------------	------------	----------------	-------------

Conditions

And

Current Legal County

And

Case Status in list 'PENDING ,REOPEN PENDING'

Or

Medi-Cal Number Matches pattern '\_\_8X%'

Or

Medi-Cal Number Matches pattern '\_\_0C%'

Or

Medi-Cal Number Matches pattern '\_\_7Y%'

Or

Medi-Cal Number Matches pattern '\_\_9H%'

# Report

## Healthy Family Caseload Count Report

Total Number of Active Cases            11  
Total Number of Pending Case            2

### Active

Name	Case Number
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #
CASE NAME	CASE #

### Pending

Name	Case Number
CASE NAME	CASE #
CASE NAME	CASE #

## CMS 08 – Healthy Families Plan List Per Client

List of clients with a Healthy Families plan in the Healthy Families Coverage screen of CMS Net. Grouped by case number. **This count is not for performance measure reporting.**

Prompt: None

The screenshot displays the 'Query Panel - CMS Universe' interface. On the left, the 'Classes and Objects' pane lists various data sources, with 'Patient Registration' selected. The main workspace is divided into three sections: 'Result Objects', 'Conditions', and 'Options...'. The 'Result Objects' section shows a list of fields: Case Number, Name, Current Leg..., Current CCS..., Other Cover..., Start Date, Medi-Cal Nu..., and Case Status. The 'Conditions' section contains a logical expression: 'Current Legal County' followed by an 'And' connector, then 'Case Status In list 'ACTIVE', 'TRANSFER/ACTIVE''. Below this, there is a group of four 'Or' conditions, each stating 'Medi-Cal Number Matches pattern' followed by a specific pattern: '8X%', '0C%', '7Y%', and '9H%'. The 'Options...' button is located at the bottom left, and 'Save and Close', 'View...', 'Run', and 'Cancel' buttons are at the bottom right.

## Healthy Families Coverage for ALAMEDA

Case No	CCS Aid Code	HF Coverage	Start Date
CASE #	9K CCS	HF ALAMEDA ALLIANCE	08/09/1999
		HF DELTA DENTAL	07/09/2007
		HF KAISER PERMANENTE	07/09/2007
		HF VISION SERVICE PLAN	07/09/2007

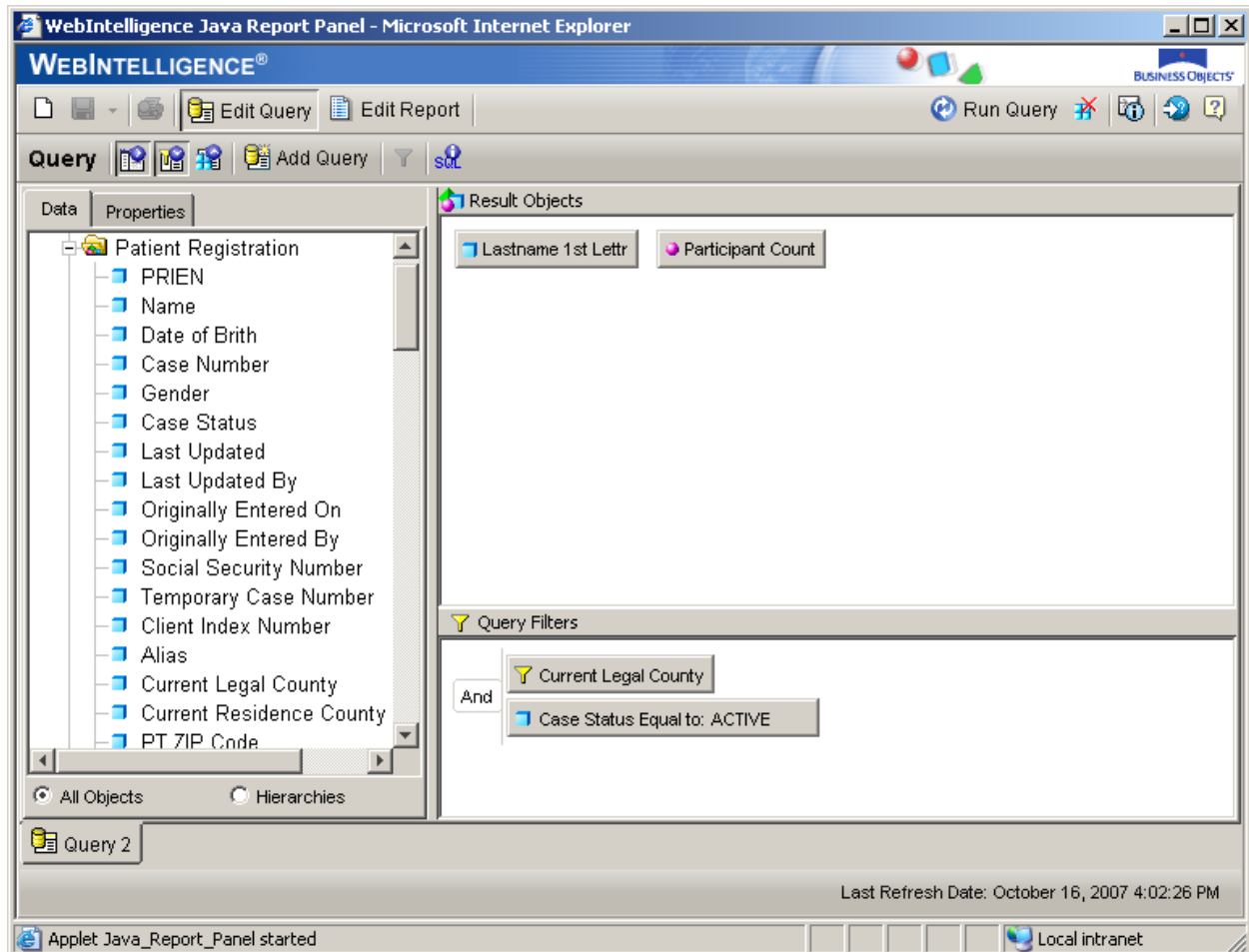
Case No	CCS Aid Code	HF Coverage	Start Date
CASE #	9R HF OVER FIN ELIG	HF DELTA DENTAL	11/05/2001
		HF KAISER PERMANENTE	11/05/2001
		HF VISION SERVICE PLAN	11/05/2001

Case No	CCS Aid Code	HF Coverage	Start Date
CASE #	9K CCS	HF ALAMEDA ALLIANCE	08/04/2007
		HF DELTA DENTAL	08/04/2007
		HF VISION SERVICE PLAN	08/04/2007

## ***CMS 09 – Count of Active Clients by First Ltrr of Last Name***

Count of active and pending cases, grouped by first letter of last name.

Prompt: None



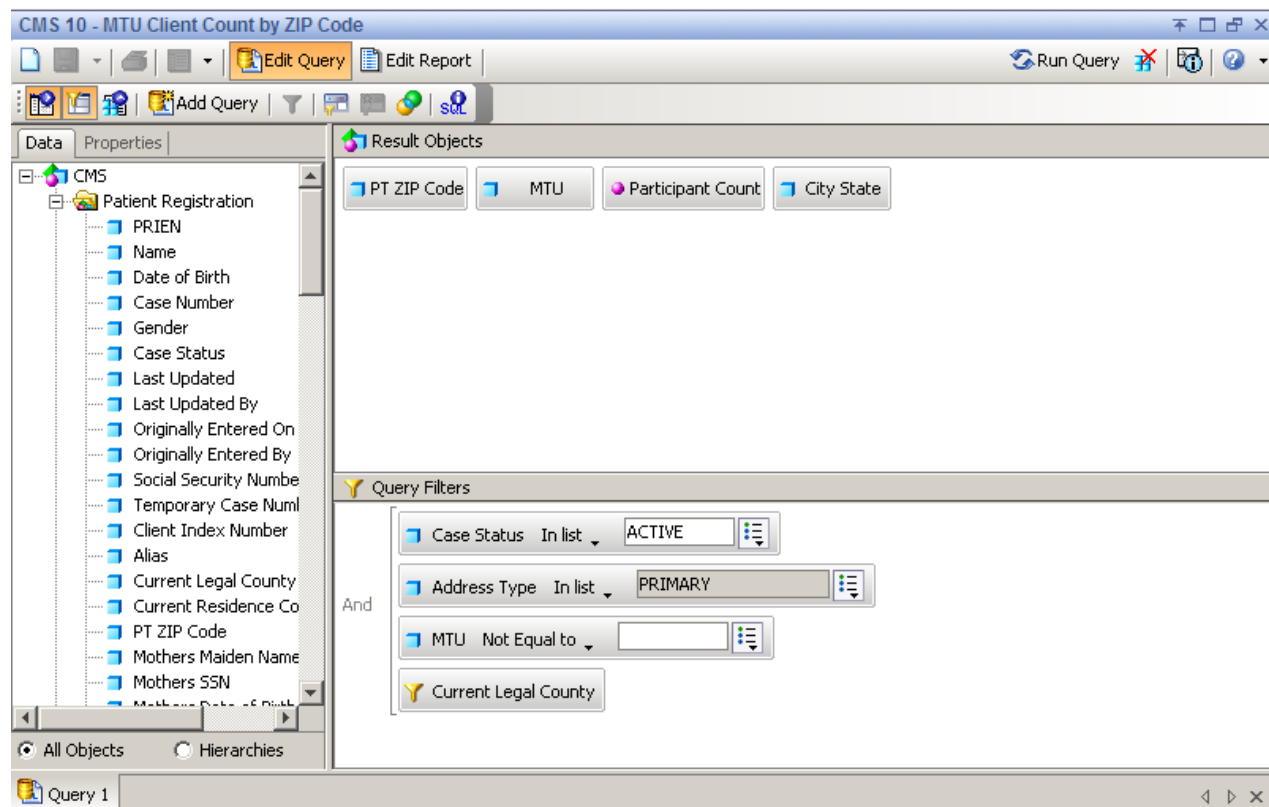
**Count of Active Clients By First Ltrr of Last Name**

Lastname 1st Lettr	Count
	18
A	7,047
B	6,170
C	9,646
D	4,141
E	2,098
F	2,995
G	8,674
H	5,860
I	556
J	2,432
K	1,743
L	6,085
M	12,000
N	2,482
O	2,528
P	5,393
Q	535
R	8,734
S	8,765
T	3,891
U	336
V	4,473
W	2,583
X	163
Y	674
Z	1,127
<b>Sum:</b>	<b>111,149</b>

## ***CMS 10 – MTU Client Count by ZIP Code***

Count of clients in MTU by Zip Code. This report is scheduled to run every month, or users can view report as of yesterday in the system. If a MTU appears that is not used by your county, it usually is because a case was transferred to your county but not closed to the MTU in the prior county.

Prompt: None



**MTU by Zip Code - 09/28/2010**

**A.B. INGHAM MTU**

Zip Code	City State	Count
93930	KING CITY, CA	1
93933	MARINA, CA	1
93955	SEASIDE, CA	1
	<b>Subtotal:</b>	<b>3</b>

**ANAHEIM MTU**

Zip Code	City State	Count
92801	ANAHEIM, CA	3
92802	ANAHEIM, CA	1
92805	ANAHEIM, CA	2
92806	ANAHEIM, CA	1
	<b>Subtotal:</b>	<b>7</b>

**BAY MTU**

Zip Code	City State	Count
94536	FREMONT, CA	1
94538	HAYWARD, CA	1
94541	HAYWARD, CA	1
94542	HAYWARD, CA	1
94544	HAYWARD, CA	3
94545	HAYWARD, CA	4
94546	CASTRO VALLEY, CA	2
94552	CASTRO VALLEY, CA	1
94577	SAN LEANDRO, CA	2
94578	SAN LEANDRO, CA	1
94580	SAN LORENZO, CA	1



## CMS 11 – Cases Closed Due to Death of Client

List of clients who were closed due to closure reason “Death of Client” in prior month. This report is scheduled to run every month, or users can view report as of yesterday in the system. There are filters in the “Edit Report” screen to narrow down the results to the prior month (not shown).

Prompt: None

## Cases Closed Due to Death of Client - August 2010

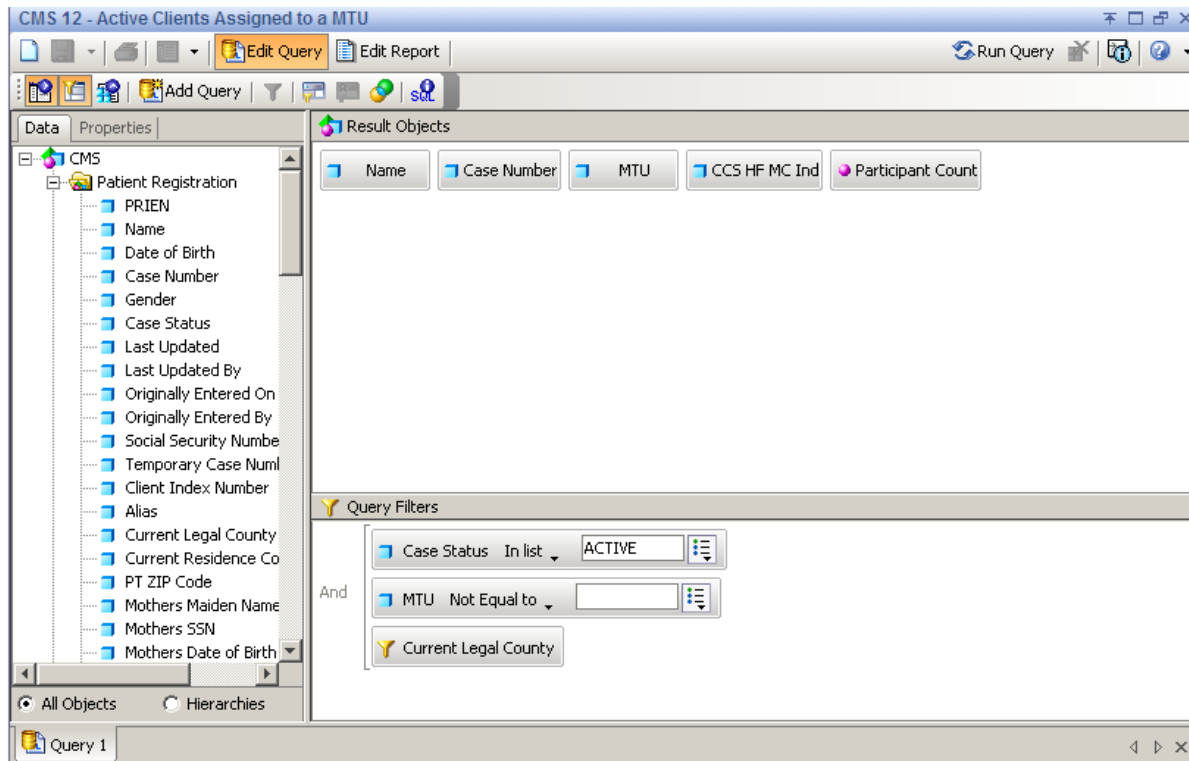
CCS Number	Name	DOB	ICD9 1	ICD9 2	ICD9 3	ICD9 4
CASE #	CASE NAME	DOB	330.8	V44.1	V44.0	
CASE #	CASE NAME	DOB	284.8	571.40	585.9	V41.2
CASE #	CASE NAME	DOB	769	770.0	772.13	V77.7
CASE #	CASE NAME	DOB	772.10	518.81		

**Grand Total:** 4

## ***CMS 12 – Active Clients Assigned to a MTU***

List of clients per MTU with their funding source. Funding source totals at bottom of report. Funding source information from Medi-Cal Aid Code.

Prompt: None



## Active Clients Assigned to a MTU with Funding Source - 9/28/10

### CHULA VISTA MTU

Name	Case Number	Funding Source
CASE NAME	CASE #	MC
CASE NAME	CASE #	MC
CASE NAME	CASE #	HF
CASE NAME	CASE #	MC
CASE NAME	CASE #	CCS
Total:	5	

### WINNIE-WAKELY MTU

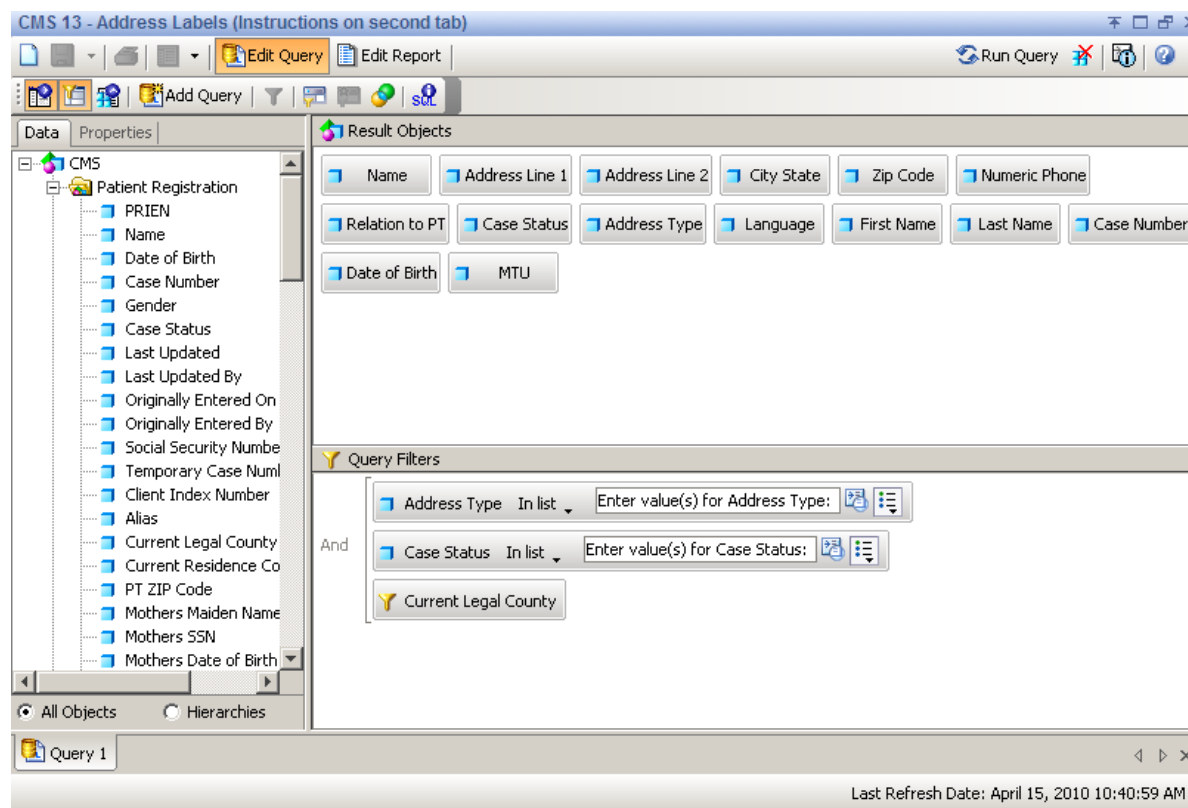
Name	Case Number	Funding Source
CASE NAME	CASE #	MC
CASE NAME	CASE #	MC
CASE NAME	CASE #	MC
Total:	3	

Funding Source	Count
CCS	1
HF	1
MC	6
Total:	8

### ***CMS 13 – Address Labels (Instructions on second tab)***

List of clients with address information, used in printing labels. The second tab of the report contains instructions for creating address labels in Microsoft Word 2003.

Prompt: Address Type, Case Status



Report contains the following fields:

- Addressee Name
- Address Line 1
- Address Line 2
- City State
- Zip Code
- Phone Number
- Language
- Relation to PT
- Client First Name
- Client Last Name
- Case Number
- Date of Birth
- MTU
- Case Status
- Address Type

## CMS 14 – Active Pending Counts and List

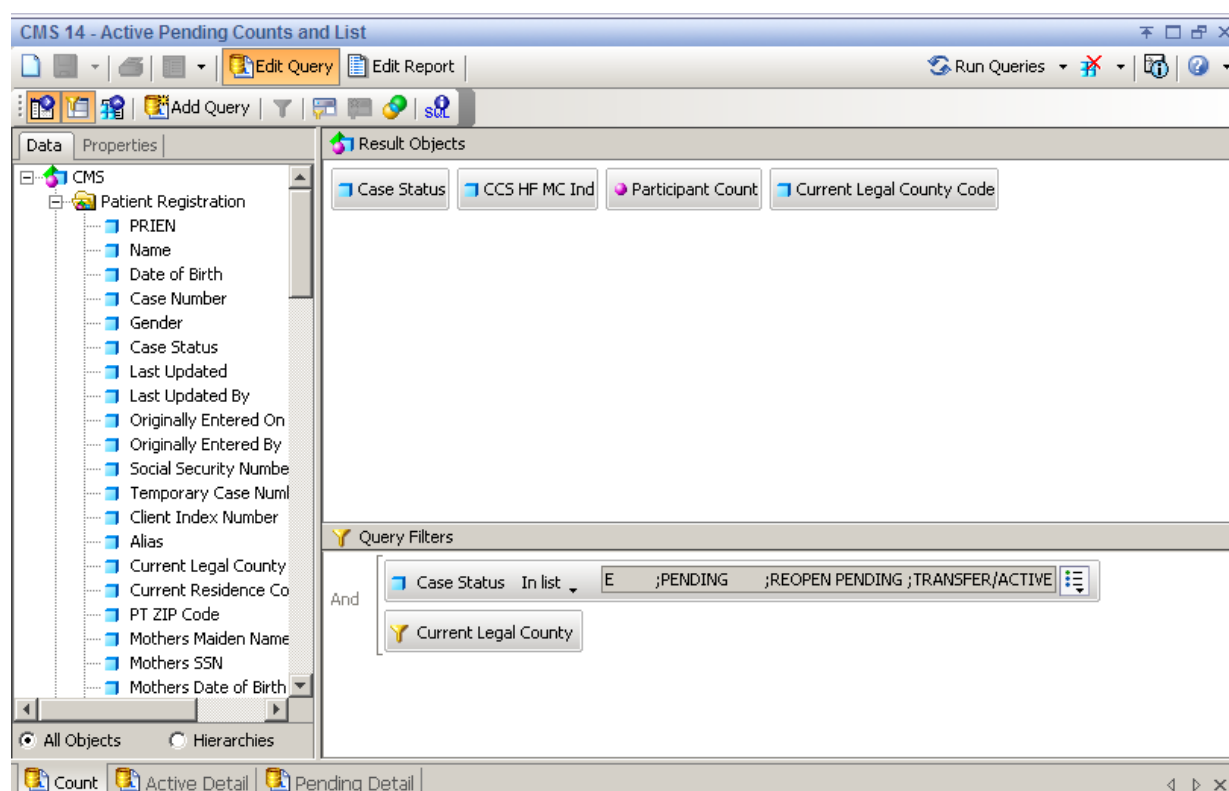
Four tabs are included in this report:

- Active and Pending Count by Case Status, Funding Source
- Active and Pending Count by Funding Source, Case Status
- Active List
- Pending List

Prompt: None

### Active and Pending Count by Case Status, Funding Source

Count of clients by Case Status, then Funding Source



### Active and Pending Count by Case Status, Funding Source

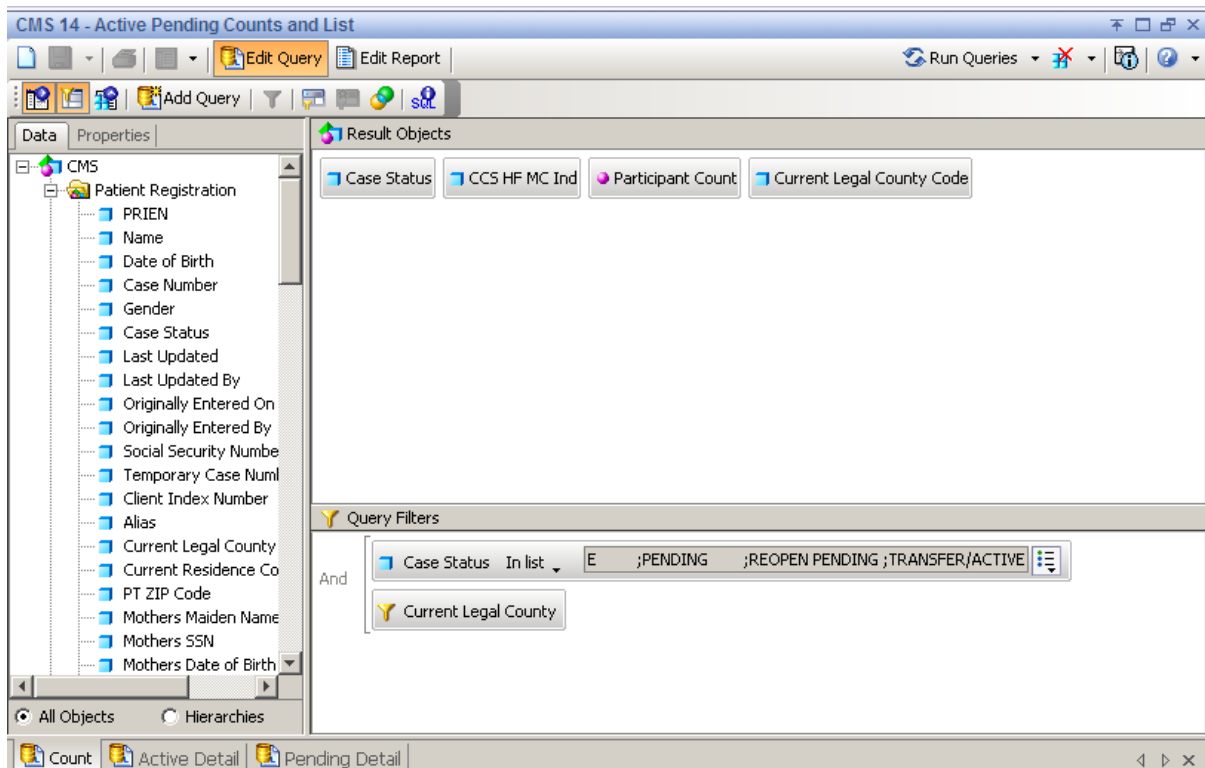
Case Status	Funding Source	Participant Count
ACTIVE	CCS	2
	HF	1
	MC	8
ACTIVE TOTAL:		11

Case Status	Funding Source	Participant Count
PENDING	CCS	1
	HF	1
	MC	3
PENDING TOTAL:		5

GRAND TOTAL:		16
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## Active and Pending Count by Funding Source, Case Status

Count of clients by Funding Source, then Case Status



### Active and Pending Count by Funding Source, Case Status

Funding Source	Case Status	Participant Count
CCS	ACTIVE	1
	PENDING	1
CCS		2

Funding Source	Case Status	Participant Count
HF	ACTIVE	2
	PENDING	1
HF		3

Funding Source	Case Status	Participant Count
MC	ACTIVE	8
	PENDING	3
MC		11

GRAND TOTAL:		16
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## Active List

List of active clients.

**CMS 14 - Active Pending Counts and List**

Run Queries

**Data** Properties

**Result Objects**

Name Case Number Date of Birth Ref Tran Dt Reg Case Status Prog Elig Beg Dt  
 Prog Elig End Dt Current Elig Start Date Medi-Cal Number Current CCS Elig Status CCS HF MC Ind  
 Current Pending Elig Type Current Legal County Code

**Query Filters**

Case Status In list E ;TRANSFER/ACTIVE;PENDING ;REOPEN PENDING  
 And  
 Current Legal County

All Objects Hierarchies

Count Active Detail Pending Detail

## Active List

Name	Case #	DOB	Ref/Trans Dt	Case Status	Prog Beg Dt	Prog End Dt	Elig Start Dt	Elig Status	Medi-Cal Number	Fund Src
CASE NAME	CASE #	DOB	09/05/2009	ACTIVE	09/05/2010	09/04/2011	09/05/2009	9N M/C ONLY	MC #	MC
CASE NAME	CASE #	DOB	01/23/2006	ACTIVE	03/08/2010	03/07/2011	03/01/2009	9U HF - ELIG NOT COM	MC #	HF
CASE NAME	CASE #	DOB	06/22/2010	ACTIVE	05/23/2010	05/22/2011	05/23/2010	9N M/C ONLY	MC #	MC
CASE NAME	CASE #	DOB	07/20/2010	ACTIVE	07/04/2010	07/03/2011	07/04/2010	9N M/C ONLY	MC #	MC
CASE NAME	CASE #	DOB	06/04/2008	ACTIVE	08/04/2010	06/03/2011	08/01/2009	9N M/C ONLY	MC #	MC
CASE NAME	CASE #	DOB	06/04/1999	ACTIVE	08/04/2010	06/03/2011	06/04/1999	9N M/C ONLY	MC #	MC
CASE NAME	CASE #	DOB	12/18/1999	ACTIVE	03/21/2010	03/20/2011	01/08/2001	9K CCS	MC #	CCS
CASE NAME	CASE #	DOB	10/18/2008	ACTIVE	01/09/2010	01/08/2011	04/01/2009	9N M/C ONLY	MC #	MC
CASE NAME	CASE #	DOB	09/14/2010	ACTIVE	08/03/2010	06/02/2011	06/03/2010	9N M/C ONLY	MC #	MC
CASE NAME	CASE #	DOB	02/20/2008	ACTIVE	02/14/2010	02/13/2011	02/14/2008	9N M/C ONLY	MC #	MC
CASE NAME	3858742	DOB	11/13/2006	ACTIVE	12/22/2009	12/21/2010	12/22/2006	9U HF - ELIG NOT COM	MC #	HF
<b>ACTIVE TOTAL:</b>	<b>11</b>									

## Pending List

List of pending clients.

## Pending List

Name	Case #	DOB	Ref/Trans Dt	Case Status	Prog Beg Dt	Prog End Dt	Pend Elig Type	Medi-Cal Number	Fund Src
CASE NAME	CASE #	DOB	07/16/2010	REOPEN PENDING	05/27/2009	05/26/2010		MC #	MC
CASE NAME	CASE #	DOB	05/13/2010	REOPEN PENDING	06/19/2009	06/19/2009		MC #	MC
CASE NAME	CASE #	DOB	09/20/2010	REOPEN PENDING	06/29/2009	06/28/2010		MC #	CCS
CASE NAME	CASE #	DOB	09/07/2010	REOPEN PENDING	12/01/2008	09/30/2009		MC #	MC
CASE NAME	CASE #	DOB	08/12/2010	REOPEN PENDING	01/28/2010	08/11/2010		MC #	HF
PENDING TOTAL:	5								

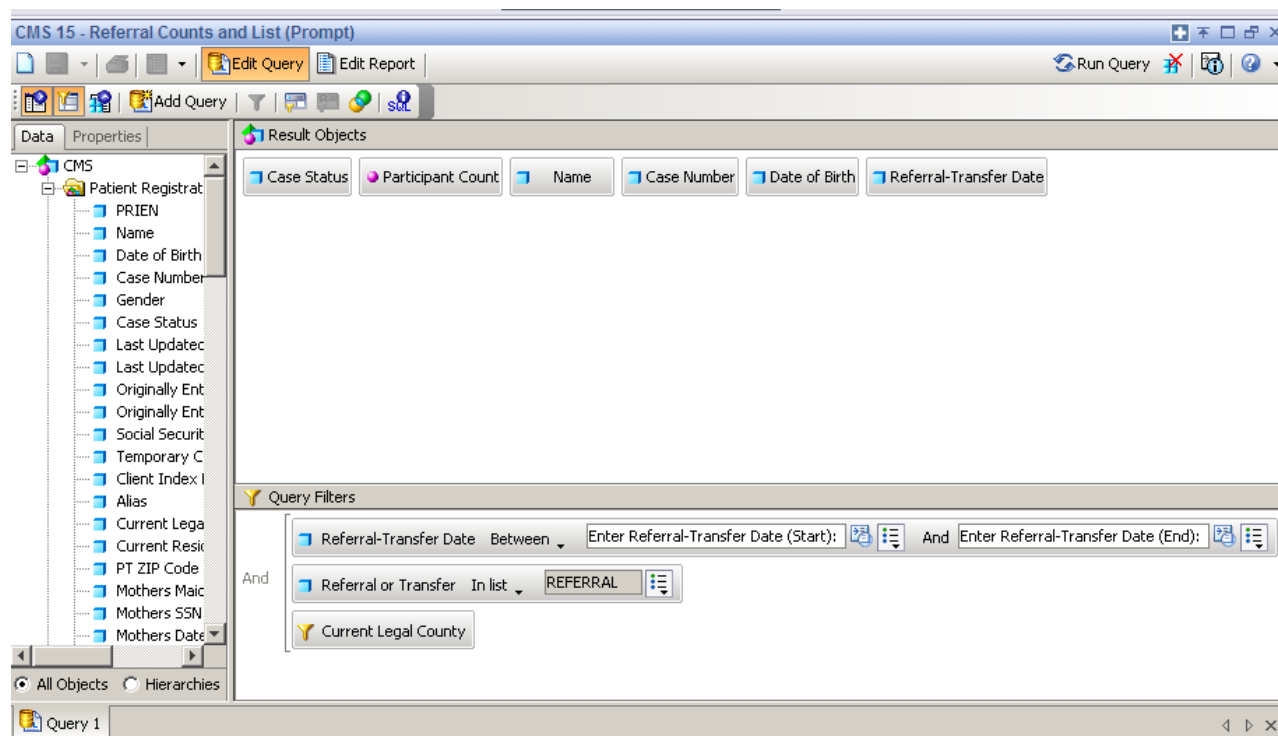
## ***CMS 15 – Referral Counts and List (Prompt)***

Report will display clients with a referral date between the Referral Date Start and Referral Date End.

Two tabs are included in this report:

- Referral Counts
- Referral List

Prompt: Referral Date Start, Referral Date End



## Referral Counts

Case Status	Participant Count
ACTIVE	6
CLOSED	3
DENIED	5
NOT OPEN	2
PENDING	1
REOPEN PENDING	1
TRANSFER/ACTIVE	1
<b>TOTAL:</b>	<b>19</b>

## Referral List

### ACTIVE

Name	Case Number	Date of Birth	Referral Date
CASE NAME	CASE #	DOB	02/16/2010
CASE NAME	CASE #	DOB	02/26/2010
CASE NAME	CASE #	DOB	01/14/2010
CASE NAME	CASE #	DOB	02/10/2010
CASE NAME	CASE #	DOB	02/25/2010
CASE NAME	CASE #	DOB	02/05/2010
<b>Count:</b>	<b>6</b>		

### CLOSED

Name	Case Number	Date of Birth	Referral Date
CASE NAME	CASE #	DOB	02/16/2010
CASE NAME	CASE #	DOB	02/26/2010
CASE NAME	CASE #	DOB	01/14/2010
<b>Count:</b>	<b>3</b>		

### DENIED

Name	Case Number	Date of Birth	Referral Date
CASE NAME	CASE #	DOB	02/16/2010

## ***CMS 16 – Cases Between an Age Range (Prompt)***

Report will display clients with an age between Age Years Start and Age Years End.  
Report groups clients by age.

Prompt: Age Years Start, Age Years End

The screenshot shows the 'CMS 16 - Cases Between an Age Range (Prompt)' application window. The interface includes a menu bar with 'Edit Query' and 'Edit Report', and a toolbar with 'Run Query', 'Add Query', and other icons. On the left, a 'Data' pane shows a tree view of the 'CMS' database structure, including 'Patient Registration' and various fields like 'Name', 'Date of Birth', 'Case Number', 'Gender', 'Case Status', 'Last Updated', 'Last Updated By', 'Originally Entered On', 'Originally Entered By', 'Social Security Number', 'Temporary Case Number', 'Client Index Number', 'Alias', 'Current Legal County', 'Current Residence Code', 'PT ZIP Code', 'Mothers Maiden Name', 'Mothers SSN', and 'Mothers Date of Birth'. The 'Properties' pane on the right shows 'Result Objects' with fields: 'Date of Birth', 'Case Status', 'Case Number', 'Name', 'Age Years', 'Age Months', 'CCS HF MC Ind', 'Medi-Cal Number', 'Ref Tran Dt Reg', and 'Current Legal County Code'. Below this, the 'Query Filters' section contains two filter rules. The first rule is 'Case Status In list E ;TRANSFER/ACTIVE;PENDING ;REOPEN PENDING'. The second rule is 'Age Years Between Enter Age Years (Start): [dropdown] And Enter Age Years (End): [dropdown]'. A third filter 'Current Legal County' is listed below. At the bottom, there are radio buttons for 'All Objects' and 'Hierarchies', and a 'Query 1' tab.

# Cases Between a Specific Age Range

## Age 16

Name	Case Number	Date of Birth	Referral Date	Age Years	Age Months	Case Status	Medi-Cal Num	Funding Src
CASE NAME	CASE #	DOB	05/08/2003	16	8	ACTIVE	MC #	MC
CASE NAME	CASE #	DOB	04/21/2005	16	2	ACTIVE	MC #	MC
CASE NAME	CASE #	DOB	10/17/2005	16	4	ACTIVE	MC #	MC

TOTAL: 3

## Age 17

Name	Case Number	Date of Birth	Referral Date	Age Years	Age Months	Case Status	Medi-Cal Num	Funding Src
CASE NAME	CASE #	DOB	02/08/2010	17	1	ACTIVE	MC #	MC
CASE NAME	CASE #	DOB	03/22/2010	17	4	ACTIVE	MC #	HF
CASE NAME	CASE #	DOB	07/16/2010	17	8	REOPEN PENDING	MC #	MC
CASE NAME	CASE #	DOB	03/19/2010	17	9	ACTIVE	MC #	MC
CASE NAME	CASE #	DOB	11/04/2009	17	11	ACTIVE	MC #	MC
CASE NAME	CASE #	DOB	11/14/2001	17	8	ACTIVE	MC #	MC
CASE NAME	CASE #	DOB	04/14/2010	17	5	ACTIVE	MC #	MC
CASE NAME	CASE #	DOB	01/11/2009	17	4	ACTIVE	MC #	CCS
CASE NAME	CASE #	DOB	12/18/2006	17	8	ACTIVE	MC #	MC
CASE NAME	CASE #	DOB	09/18/2000	17	10	ACTIVE	MC #	MC

TOTAL: 10

GRAND TOTAL: 13

## ***CMS 17 – Active Pending Diagnoses Counts and List (Prompt)***

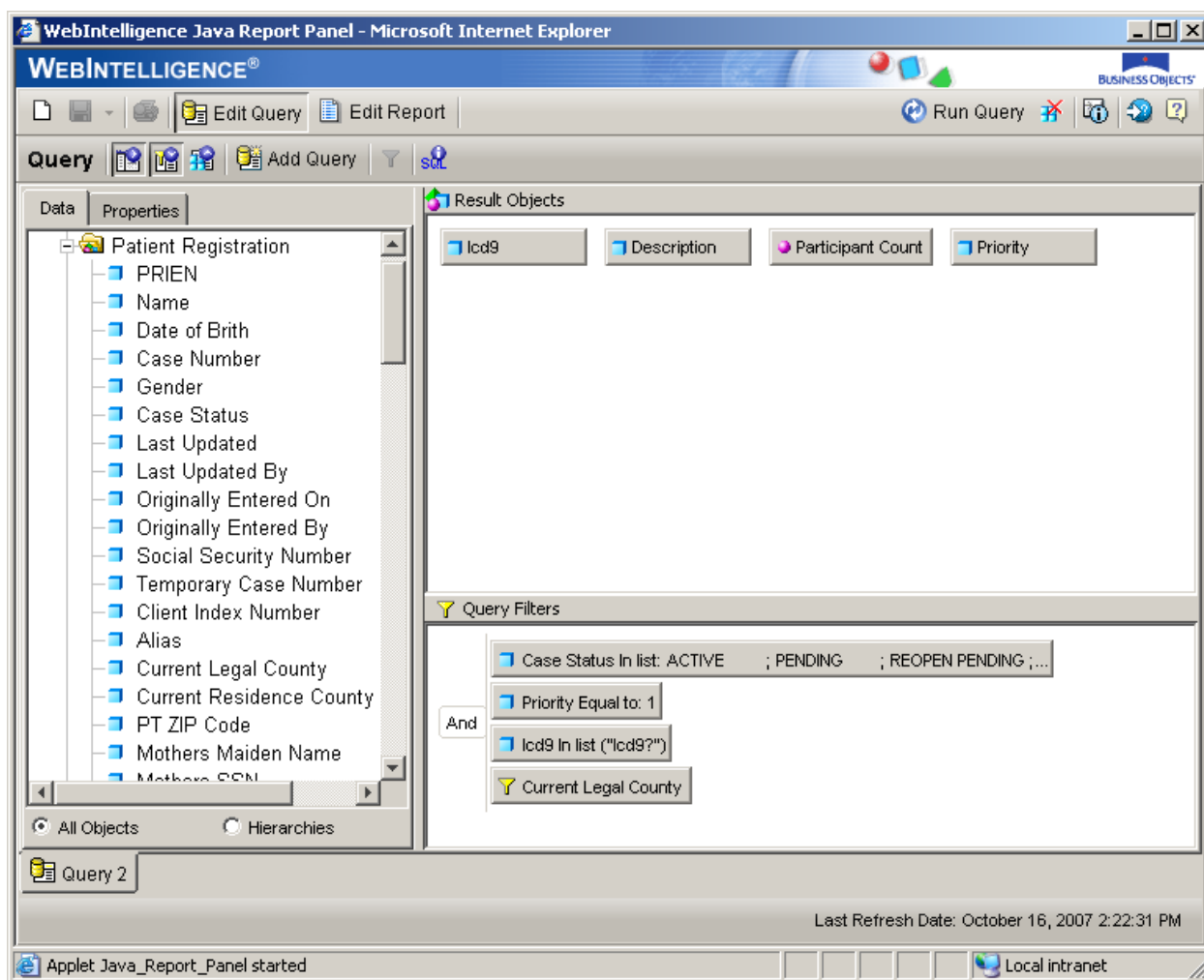
Two tabs are included in this report:

- Active Pending Cases Diagnoses Counts
- Active Pending Cases Diagnoses List

Prompt: Range of ICD9 Codes

### **Active Pending Cases Diagnoses Counts**

Count of Active and Pending Cases by Diagnosis.



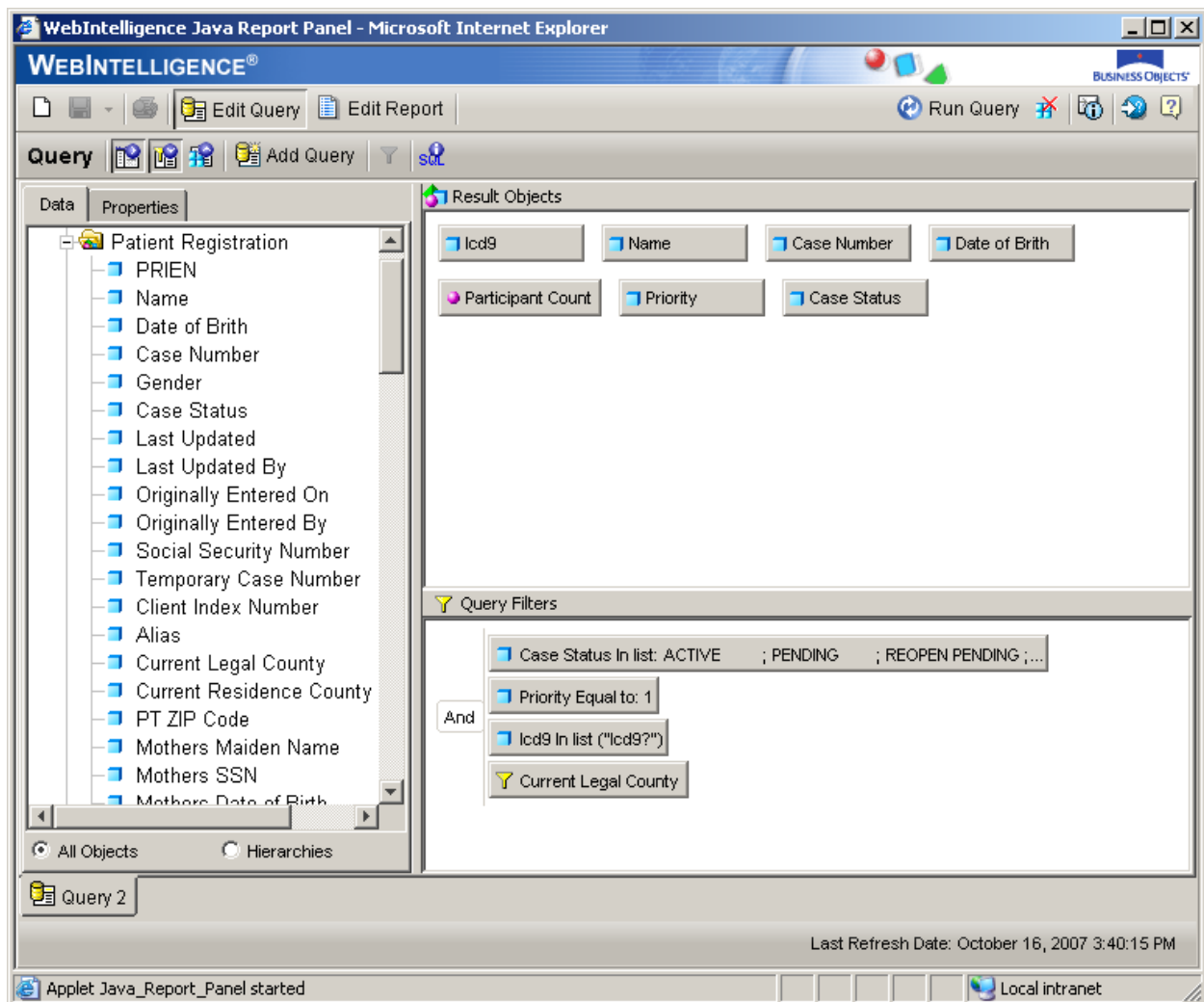
**Active Pending Cases Diagnoses Counts**

<b>Icd9</b>	<b>Description</b>	<b>Count</b>
396.0	MITRAL VALVE STENOSIS AND AORTIC VALVE STENOSIS	15
396.1	MITRAL VALVE STENOSIS AND AORTIC VALVE INSUFFICIENCY	2
396.2	MITRAL VALVE INSUFFICIENCY AND AORTIC VALVE STENOSIS	5
396.3	MITRAL VALVE AND AORTIC VALVE INSUFFICIENCY	1
396.3	MITRAL VALVE INSUFFICIENCY AND AORTIC VALVE INSUFFICIENCY	18
396.8	MULTIPLE INVOLVEMENT OF MITRAL AND AORTIC VALVES	1
396.9	MITRAL AND AORTIC VALVE DISEASES, UNSPECIFIED	7
397	DISEASES OF OTHER ENDOCARDIAL STRUCTURES	1
397.0	DISEASES OF TRICUSPID VALVE	18
398.0	RHEUMATIC MYOCARDITIS	1
398.90	RHEUMATIC HEART DISEASE, UNSPECIFIED	10
398.91	RHEUMATIC HEART FAILURE (CONGESTIVE)	1
401.0	MALIGNANT ESSENTIAL HYPERTENSION	14
401.1	BENIGN ESSENTIAL HYPERTENSION	24
401.9	HYPERTENSION	1
401.9	UNSPECIFIED ESSENTIAL HYPERTENSION	193
402	HYPERTENSIVE HEART DISEASE	2
402.10	HYPERTENSIVE HEART DISEASE, BENIGN, WITHOUT HEART FAILURE	1
402.90	HYPERTENSIVE HEART DISEASE, UNSPECIFIED, WITHOUT HEART FAILURE	6
402.91	HYPERTENSIVE HEART DISEASE, UNSPECIFIED, WITH HEART FAILURE	1
402.91	UNSPECIFIED HYPERTENSIVE HEART DISEASE WITH CONGESTIVE HEART FAILURE	1
403	HYPERTENSIVE RENAL DISEASE	2
<b>Total:</b>		<b>325</b>



## Active Pending Cases Diagnoses Listing

List of Active and Pending Cases by ICD9 Code.



### Active Pending Diagnoses Listing

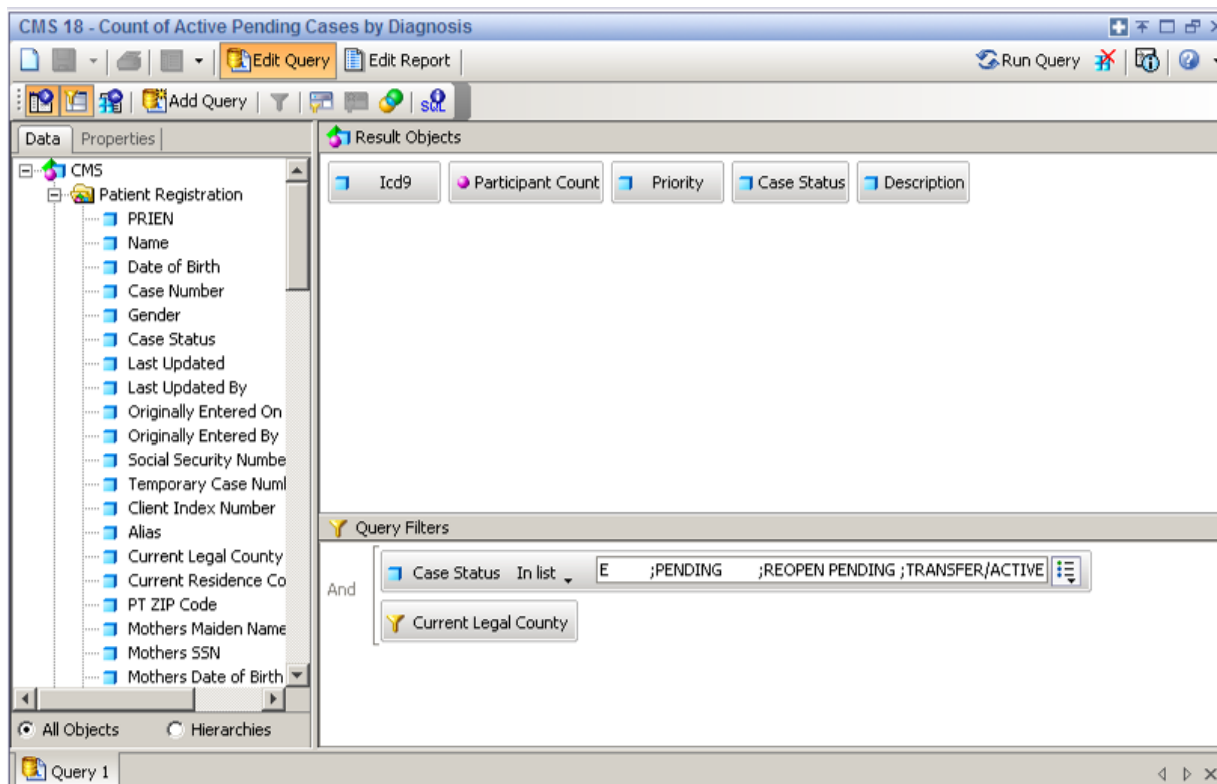
#### ACTIVE

Icd9	Name	Case Number	DOB
389.02	CLIENT NAME	CASE #	11/01/2001
		1	
Icd9	Name	Case Number	DOB
389.10	CLIENT NAME	CASE #	05/08/2004
	CLIENT NAME	CASE #	08/01/1992
	CLIENT NAME	CASE #	04/03/1989
		3	
Icd9	Name	Case Number	DOB
389.9	CLIENT NAME	CASE #	07/31/2007
		1	
<b>Total:</b>		5	

## CMS 18 – Count of Active Pending Cases by Diagnosis

Count of clients by Case Status, ICD9 Diagnosis, and Priority.

Prompt: None



### Active Pending Diagnoses Counts

9/28/10 2:21:12 PM

#### ACTIVE

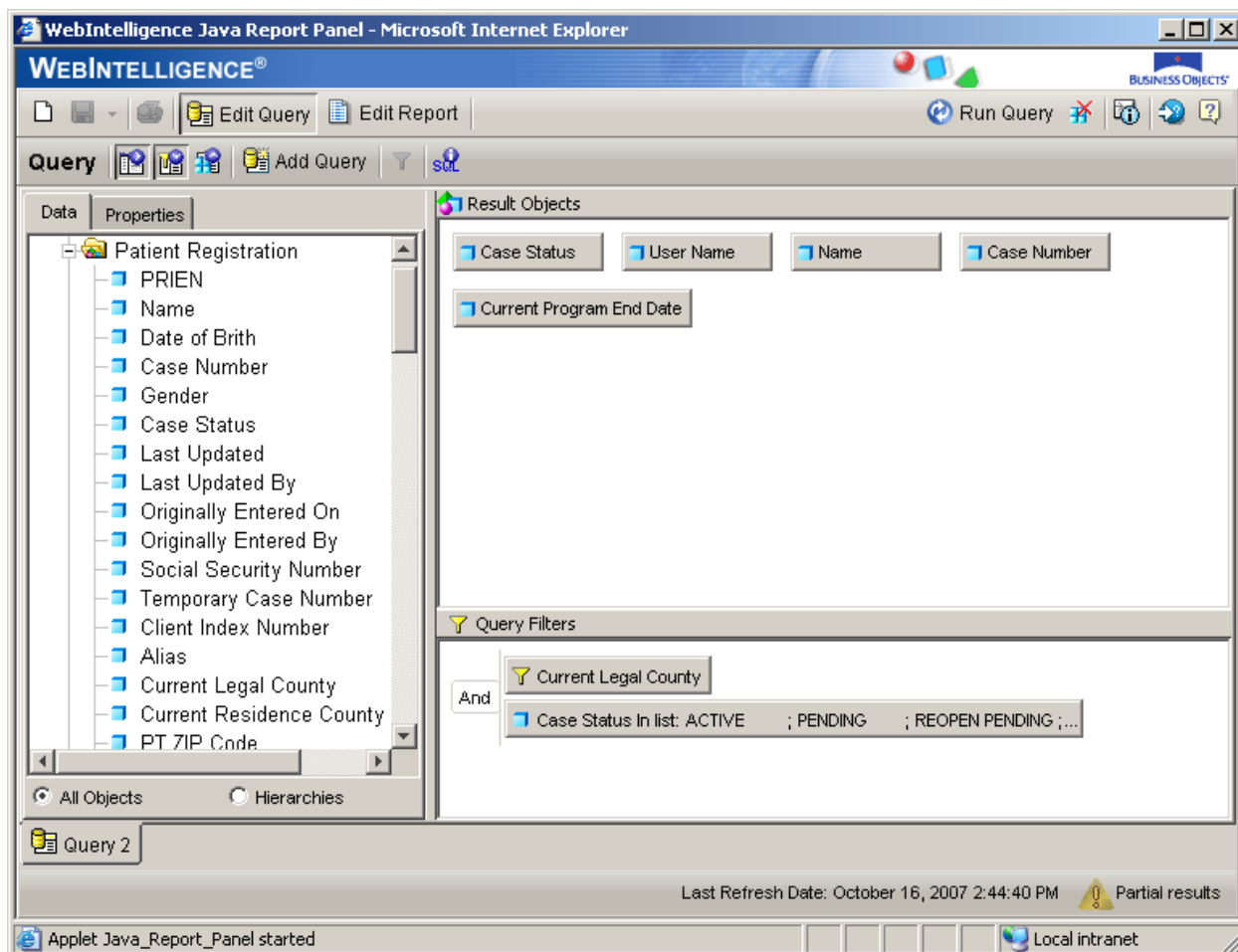
Icd9	Description	Priority	Count
000.00	UNDIAGNOSED CONDITION	1	60
		2	34
		3	9
		4	10
		5	1
Sum:			114

Icd9	Description	Priority	Count
001.0	CHOLERA DUE TO VIBRIO CHOLERAE	3	2
		5	1
Sum:			3

## ***CMS 19 – Active Pending Cases by County Case Manager***

Lists all active and pending cases by Case Status, then County Case Manager.

Prompt: None



### Active Pending Cases by County Case Manager

#### ACTIVE

User Name	Name	Case Number	Current Program End Date
COUNTY CASE MGR NAME	CLIENT NAME	CASE #	
	CLIENT NAME	CASE #	08/15/08
Count:		2	

User Name	Name	Case Number	Current Program End Date
COUNTY CASE MGR NAME	CLIENT NAME	CASE #	07/09/08
Count:		1	

Total:		3	
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#### PENDING

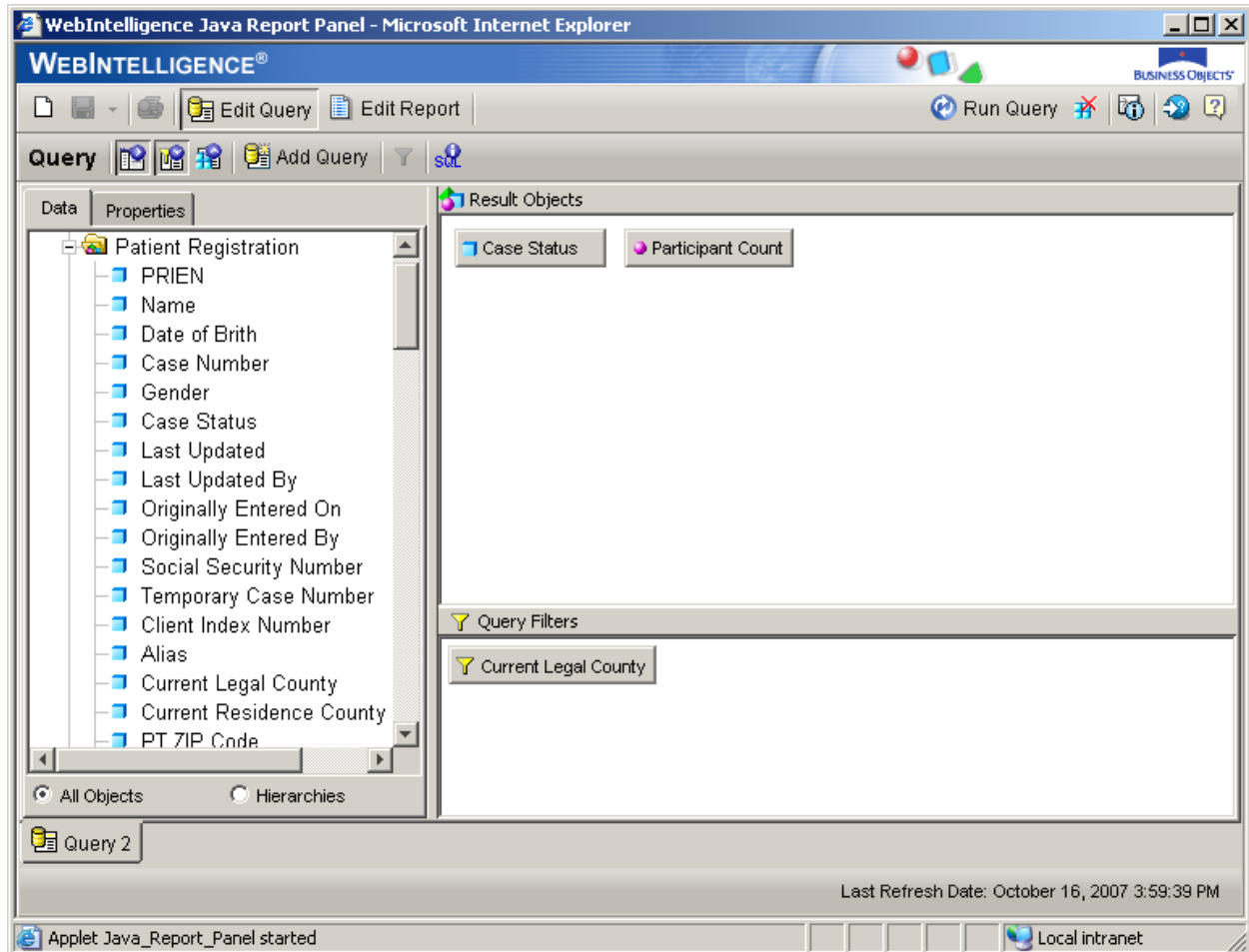
User Name	Name	Case Number	Current Program End Date
COUNTY CASE MGR NAME	CLIENT NAME	CASE #	
Count:		1	

Total:		1	
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## CMS 20 – Case Count Report

Count of clients by case status.

Prompt: None



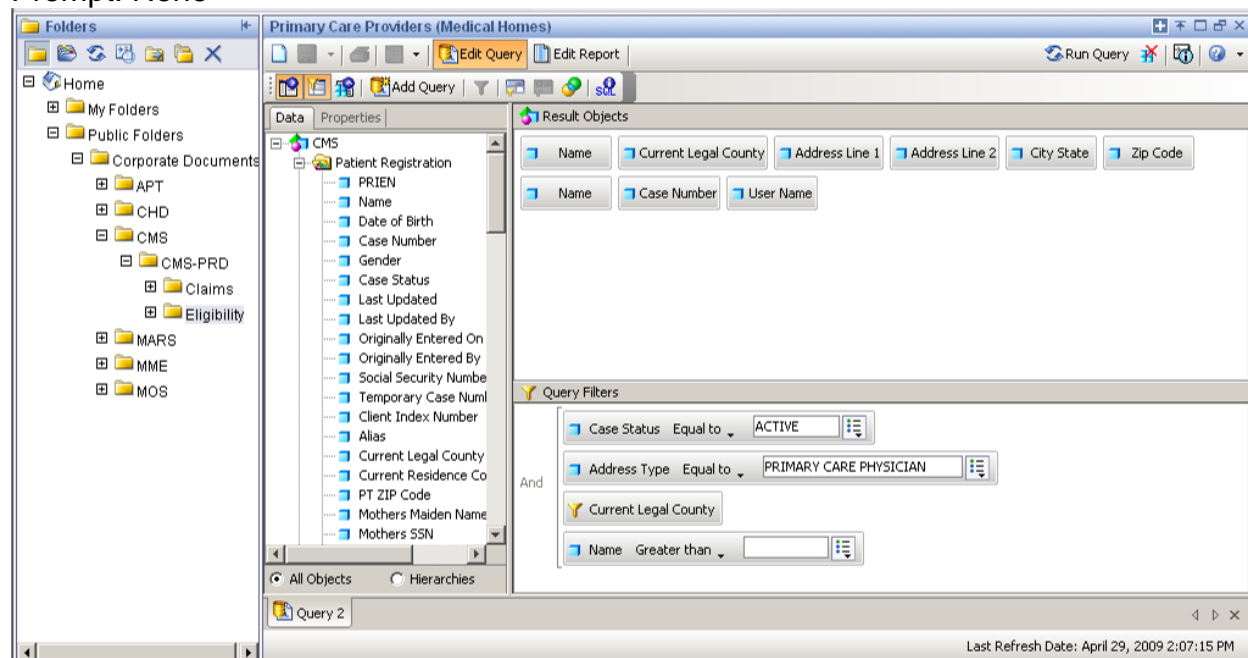
### Case Count Report

Case Status	Participant Count
ACTIVE	111,149
CLOSED	255,252
DENIED	176,497
NOT OPEN	66,962
PENDING	6,506
REOPEN PENDING	1,209
TRANSFER/ACTIVE	318
<b>Sum:</b>	<b>617,893</b>

## CMS 21 - Primary Care Providers (Medical Homes)

List of addresses of medical homes and the clients the medical home is assigned to.

Prompt: None



### Primary Care Providers (Medical Homes)

#### AARON ZAHEER MD

Address Line 1	Address Line 2	City State	Zip	CCS Case Name	Case #	Case Manager
MEDICAL HOME ADDRESS	ADDRESS	CITY, STATE	ZIP	CLIENT NAME	CASE #	CASE MGR
Count:					1	

#### ABELL MD, GEOFFREY A

Address Line 1	Address Line 2	City State	Zip	CCS Case Name	Case #	Case Manager
MEDICAL HOME ADDRESS	ADDRESS	CITY, STATE	ZIP	CLIENT NAME	CASE #	CASE MGR
MEDICAL HOME ADDRESS	ADDRESS	CITY, STATE	ZIP	CLIENT NAME	CASE #	CASE MGR
Count:					2	

#### ABJELINA MD, ANNALISA

Address Line 1	Address Line 2	City State	Zip	CCS Case Name	Case #	Case Manager
MEDICAL HOME ADDRESS	ADDRESS	CITY, STATE	ZIP	CLIENT NAME	CASE #	CASE MGR
Count:					1	

#### ABRAHAM BROUDY MD

Address Line 1	Address Line 2	City State	Zip	CCS Case Name	Case #	Case Manager
MEDICAL HOME ADDRESS	ADDRESS	CITY, STATE	ZIP	CLIENT NAME	CASE #	CASE MGR
Count:					1	



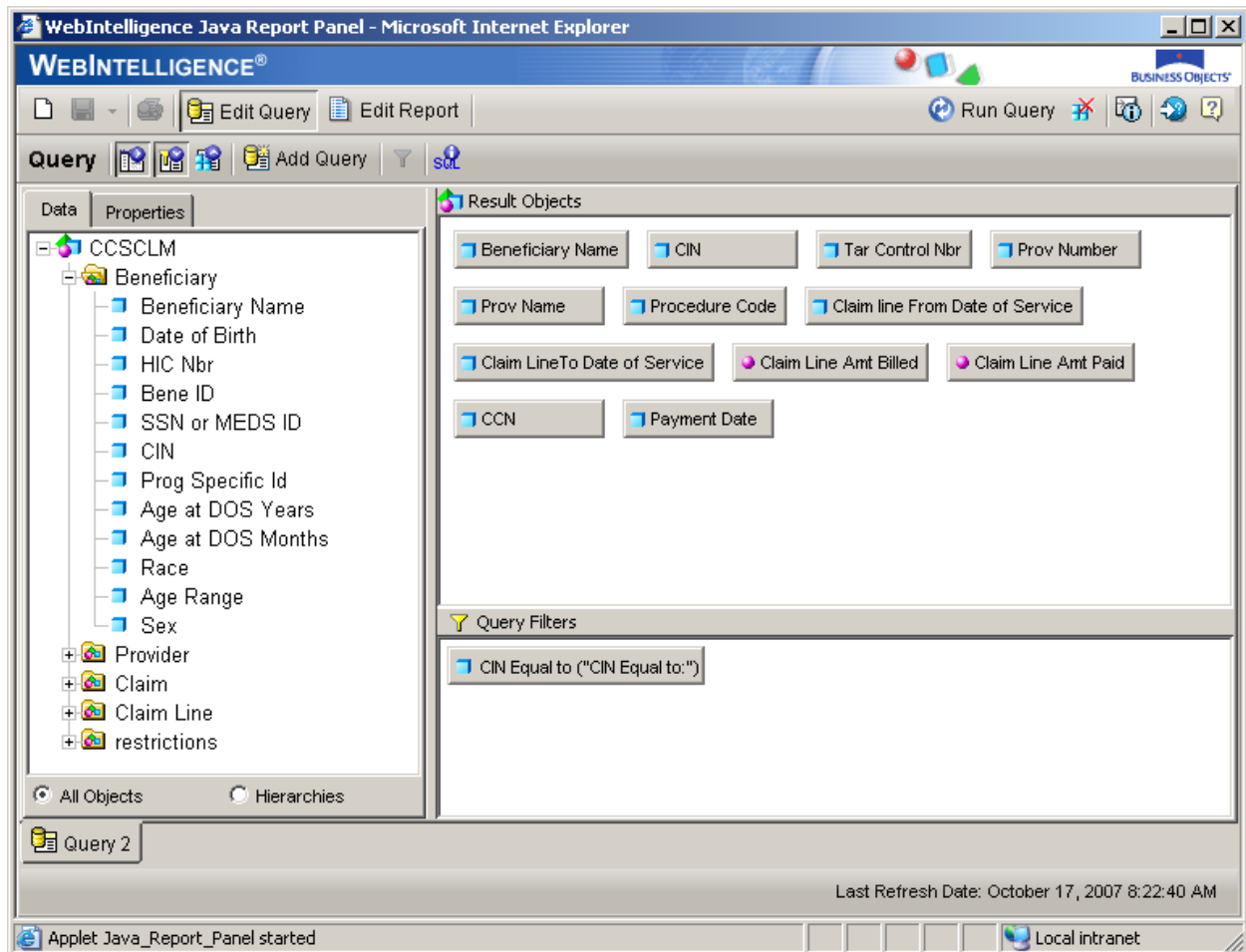
## Claims (CCS Claims) Corporate Documents

Paid claims are loaded from August 2005. Claims are updated approximately monthly, and the database usually has claims up to three months prior to the current month.

### *Expenditures (by CIN)*

Lists all claims by CIN, then SAR Number.

Prompt: Client Index Number (999999999A)



**Expenditures by CIN**

**LAST NAME FIRST NAME**  
**99999994A**

SAR/TAR	Claim Control #	Provider #	Provider Name	Proc Code	Pmt Dt	Frm DOS	To DOS	Billed	Paid
9700001234	7110999999900	GR0000000	PROVIDER NAME	99214	4/25/2007	3/3/2007	3/3/2007	\$198.00	\$30.00
	7110888888800	GR0000001	PROVIDER NAME	99215	4/25/2007	3/3/2007	3/3/2007	\$155.00	\$100.58
	7110777999900	GR0000002	PROVIDER NAME	99216	4/25/2007	3/3/2007	3/3/2007	\$30.00	\$6.01
	7110999432100	GR0000003	PROVIDER NAME	99217	4/25/2007	3/3/2007	3/3/2007	\$10.00	\$10.00
	7110996549900	GR0000004	PROVIDER NAME	99218	4/25/2007	3/3/2007	3/3/2007	\$102.00	\$9.88
<b>Sum:</b>								<b>\$495.00</b>	<b>\$156.47</b>

SAR/TAR	Claim Control #	Provider #	Provider Name	Proc Code	Pmt Dt	Frm DOS	To DOS	Billed	Paid
97000003001	7151998719900	PHA419070	PROVIDER NAME	99073012101	3/6/2006	1/19/2006	1/19/2006	\$200.26	\$172.27
	7151998718801	PHA419070	PROVIDER NAME	99073012101	3/6/2006	2/18/2006	2/18/2006	\$200.26	\$181.19
<b>Sum:</b>								<b>\$400.52</b>	<b>\$353.46</b>

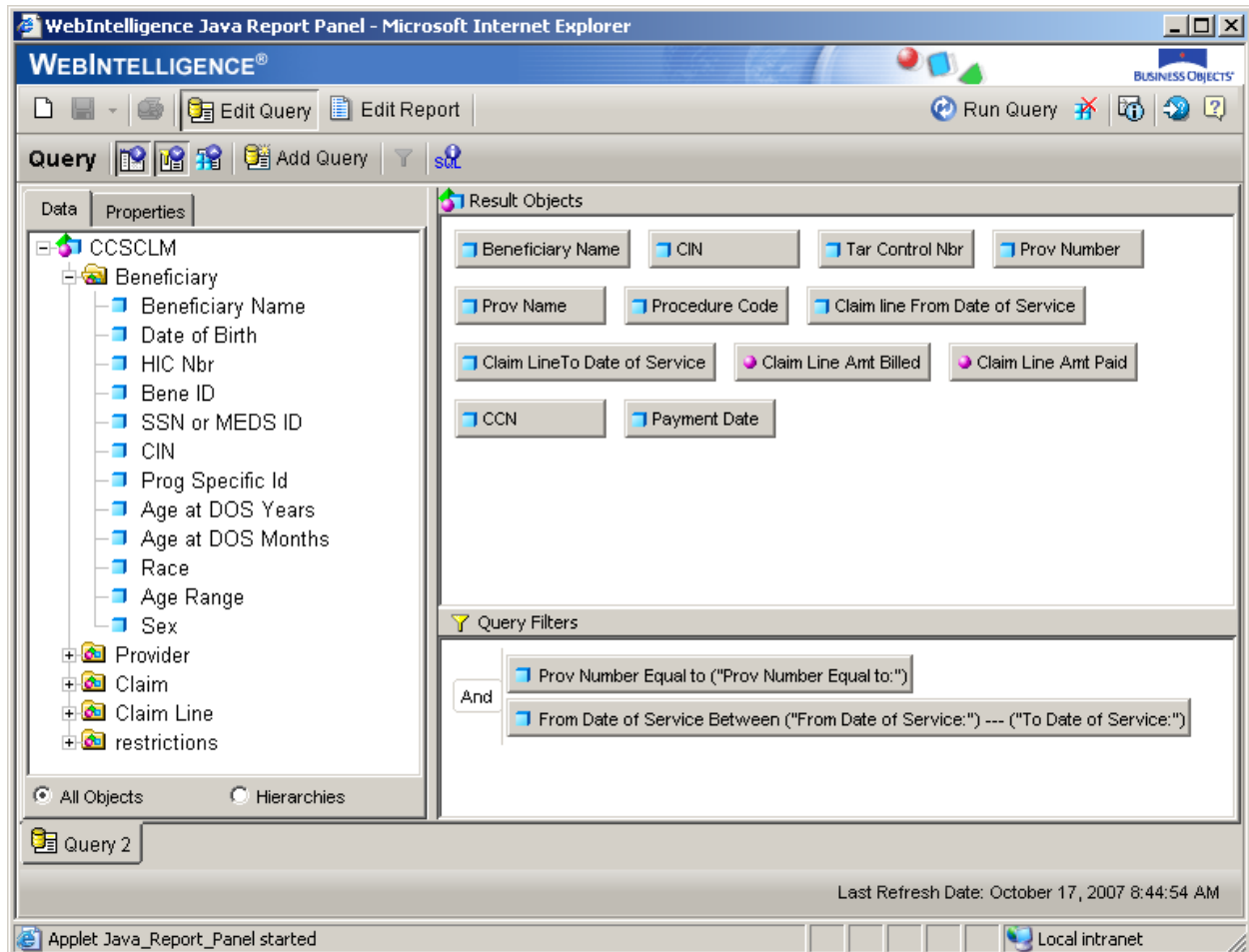
SAR/TAR	Claim Control #	Provider #	Provider Name	Proc Code	Pmt Dt	Frm DOS	To DOS	Billed	Paid
97000002771	6139999999900	PHA419070	PROVIDER NAME	00193288050	5/30/2006	1/19/2006	1/19/2006	\$26.60	\$24.89
	6139958888800	PHA419070	PROVIDER NAME	00193288050	5/30/2006	2/18/2006	2/18/2006	\$26.60	\$24.89
<b>Sum:</b>								<b>\$53.20</b>	<b>\$49.78</b>

<b>Total:</b>								<b>\$948.72</b>	<b>\$559.71</b>
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## ***Expenditures (by Provider Number, Date of Service)***

Lists claims by provider, then client.

Prompt: Provider Number, From Date of Service, To Date of Service



PROVIDER NAME  
GR0099990

Expenditures by Provider

Beneficiary Name	CIN	SAR/TAR	Claim Control #	Proc Code	Pmt Dt	Frm DOS	To DOS	Billed	Paid
CLIENT NAME	CIN	0000000000008	5101234567300	99214	4/25/2005	1/19/2005	1/19/2005	\$200.00	\$57.15
							Sum:	\$200.00	\$57.15

Beneficiary Name	CIN	SAR/TAR	Claim Control #	Proc Code	Pmt Dt	Frm DOS	To DOS	Billed	Paid
CLIENT NAME	CIN	0000000000008	5168617144400	90920	6/27/2005	1/1/2005	1/31/2005	\$650.00	\$410.15
		97002451458	5140545700000	90920	6/6/2005	1/1/2005	1/31/2005	\$650.00	\$410.15
							Sum:	\$1,300.00	\$820.30

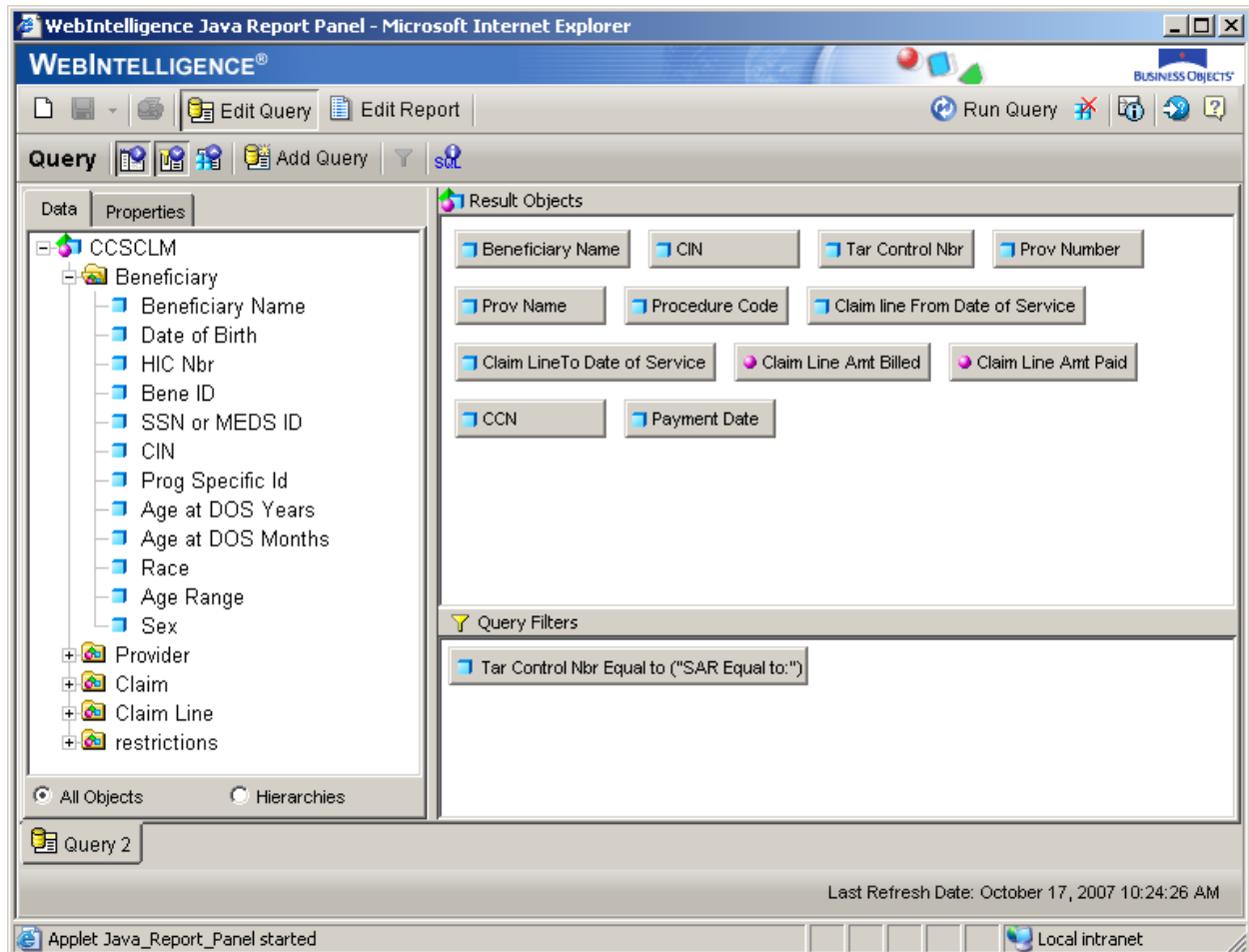
  

								Total:	\$1,500.00
									\$877.45

## ***Expenditures (by SAR Number)***

Lists claims by SAR number, then provider number.

Prompt: SAR Number



Expenditures by SAR

97000000000  
LAST NAME FIRST NAME  
99000000E

Provider #	Provider Name	Claim Control #	Proc Code	Pmt Dt	Frm DOS	To DOS	Billed	Paid
GR0000010	PROVIDER NAME	5094999999900	99255	4/18/2005	2/18/2005	2/18/2005	\$288.00	\$120.49
	PROVIDER NAME	5094999999901	99255	4/10/2006	2/18/2005	2/18/2005	(\$288.00)	(\$120.49)
	PROVIDER NAME	5094999999902	99255	4/10/2006	2/18/2005	2/18/2005	\$288.00	\$120.49
Sum:							\$288.00	\$120.49

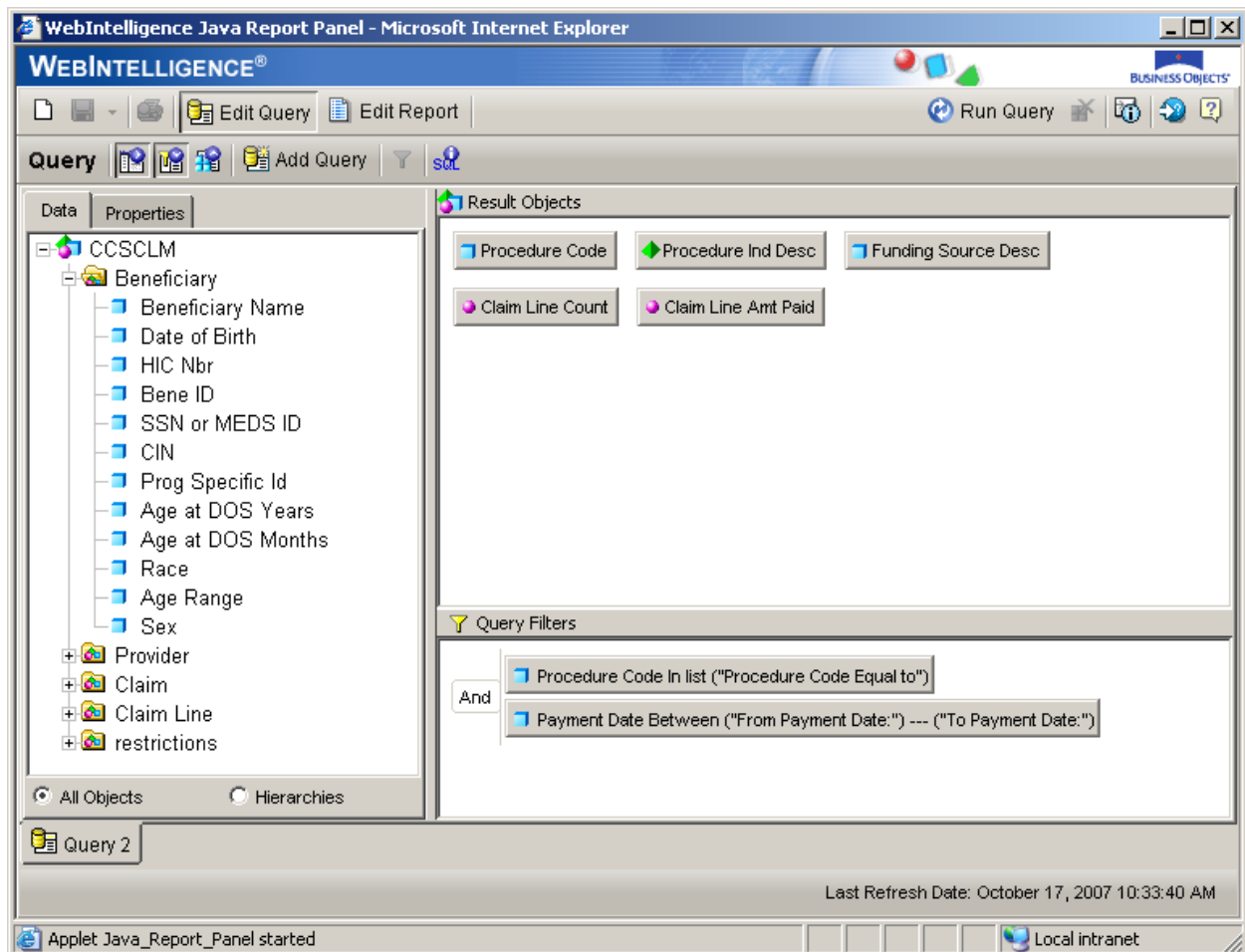
Provider #	Provider Name	Claim Control #	Proc Code	Pmt Dt	Frm DOS	To DOS	Billed	Paid
GR0094540	PROVIDER NAME	5031444444400	71020	2/22/2005	12/26/2004	12/26/2004	\$63.00	\$11.97
	PROVIDER NAME	5031444444401	71020	5/9/2005	4/15/2005	4/15/2005	\$63.00	\$11.97
	PROVIDER NAME	5031444444402	71250	5/9/2005	4/15/2005	4/15/2005	\$176.00	\$97.52
	PROVIDER NAME	5031444444403	72197	5/9/2005	4/15/2005	4/15/2005	\$343.00	\$265.08
	PROVIDER NAME	5031444444404	76880	5/31/2005	4/21/2005	4/21/2005	\$90.00	\$33.95
	PROVIDER NAME	5031444444405	93976	5/31/2005	4/21/2005	4/21/2005	\$175.00	\$36.31
	PROVIDER NAME	5031444444406	93976	4/10/2006	4/21/2005	4/21/2005	(\$175.00)	(\$36.31)
	PROVIDER NAME	5031444444407	93976	4/10/2006	4/21/2005	4/21/2005	\$175.00	\$36.31
Sum:							\$910.00	\$456.80

Total:							\$1,198.00	\$577.29
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## ***Procedure Codes by Funding Source (by Payment Date, Procedure Code)***

Count of total claims and sum of total paid by procedure code, then funding source.

Prompt: Procedure Code, From Payment Date, To Payment Date



### Procedure Codes by Funding Source

#### X0502

Procedure Ind Desc	Funding Source	Claim Count	Paid
HCPCS LEVELS II AND III	CCS-ONLY	1	\$2,964.00
HCPCS LEVELS II AND III	MEDI-CAL	6	\$10,887.00
Total:		7	\$13,851.00

#### X0504

Procedure Ind Desc	Funding Source	Claim Count	Paid
HCPCS LEVELS II AND III	CCS-ONLY	3	\$100.00
HCPCS LEVELS II AND III	HEALTHY-FAMILIES	1	\$100.00
HCPCS LEVELS II AND III	MEDI-CAL	11	\$1,100.00
Total:		15	\$1,300.00

#### X0506

Procedure Ind Desc	Funding Source	Claim Count	Paid
HCPCS LEVELS II AND III	CCS-ONLY	6	\$375.00
HCPCS LEVELS II AND III	HEALTHY-FAMILIES	5	\$200.00
HCPCS LEVELS II AND III	MEDI-CAL	40	\$5,025.00
Total:		51	\$5,600.00



## ***Expenditures Detail Report (by Payment Date, First Ltr of Last Nm)***

List of claims by funding source.

Prompt: From Payment Date, To Payment Date, From First Ltr of Last Nm, To First Ltr of Last Nm)

The screenshot displays the 'WebIntelligence Java Report Panel' within a Microsoft Internet Explorer browser. The interface is divided into several sections:

- Query:** Includes buttons for 'Edit Query', 'Edit Report', 'Add Query', and 'Run Query'.
- Data:** A tree view on the left showing the data hierarchy. The 'Beneficiary' object is expanded, revealing fields such as 'Beneficiary Name', 'Date of Birth', 'HIC Nbr', 'Bene ID', 'SSN or MEDS ID', 'CIN', 'Prog Specific Id', 'Age at DOS Years', 'Age at DOS Months', 'Race', 'Age Range', and 'Sex'. Other objects listed include 'Provider', 'Claim', 'Claim Line', and 'restrictions'.
- Result Objects:** A collection of fields available for the report, including 'Funding Source Desc', 'Beneficiary Name', 'Aid Code', 'CIN', 'Prov Number', 'Prov Name', 'Primary Diagnosis Code', 'Tar Control Nbr', 'CCN', 'Payment Date', 'Procedure Code', 'Claim Line Amt Paid', 'Claim line From Date of Service', 'Claim LineTo Date of Service', 'Claim Line Amt Billed', and 'County Name'.
- Query Filters:** A section for defining filters. Two filters are currently active:
  - 'Payment Date Between ("Payment Date From:") --- ("Payment Date To:")'
  - 'Beneficiary Name Between ("FROM: FIRST LETTER OF LAST NAME AND %(e.g., A%)") --- ("TO: FIRST LETTER OF LAST NAME AND %(e.g., B%)")'
- Footer:** Shows 'Query 2' as the active query, the 'Last Refresh Date: October 17, 2007 10:36:49 AM', a 'Partial results' warning, and the status 'Applet Java\_Report\_Panel started'.

# Expenditures Detail Report

## ALAMEDA

### MEDI-CAL

Beneficiary Name	Aid Code	CIN	Pr Diag	Provider #	Provider Name	SAR/TAR	Claim Control #	Proc Code	Pmt Dt	Paid
CLIENT NAME	60	CIN	3441	PROV #	PROV NAME	000000000008	43569999999900	Z4307	1/3/2005	\$24.97
CLIENT NAME	60	CIN	3441	PROV #	PROV NAME	000000000008	43569999999901	Z7500	1/3/2005	\$35.32
CLIENT NAME	6V	CIN	3431	PROV #	PROV NAME	000000000008	43569999999902	E1026	1/3/2005	\$192.90
CLIENT NAME	6V	CIN	74510	PROV #	PROV NAME	000000000008	43569999999903	X4112	1/3/2005	\$20.58
CLIENT NAME	30	CIN	7891	PROV #	PROV NAME	97000444999	43569999999904	99214	1/3/2005	\$45.72
CLIENT NAME	60	CIN	5849	PROV #	PROV NAME	000000000008	43569999999905	4973501028	1/3/2005	\$48.41
CLIENT NAME	60	CIN	5849	PROV #	PROV NAME	000000000008	43569999999906	0008703904	1/3/2005	\$33.76
CLIENT NAME	60	CIN	5849	PROV #	PROV NAME	000000000008	43569999999907	7007406085	1/3/2005	\$168.42
Total:										\$570.08

### HEALTHY-FAMILIES

Beneficiary Name	Aid Code	CIN	Pr Diag	Provider #	Provider Name	SAR/TAR	Claim Control #	Proc Code	Pmt Dt	Paid
CLIENT NAME	9H	CIN	EMPTY	PROV #	PROV NAME	97000110041	49999966494000	6050501340	1/3/2005	\$317.62
CLIENT NAME	9H	CIN	EMPTY	PROV #	PROV NAME	97000210041	49999966494100	6050501330	1/3/2005	\$240.42
Total:										\$558.04

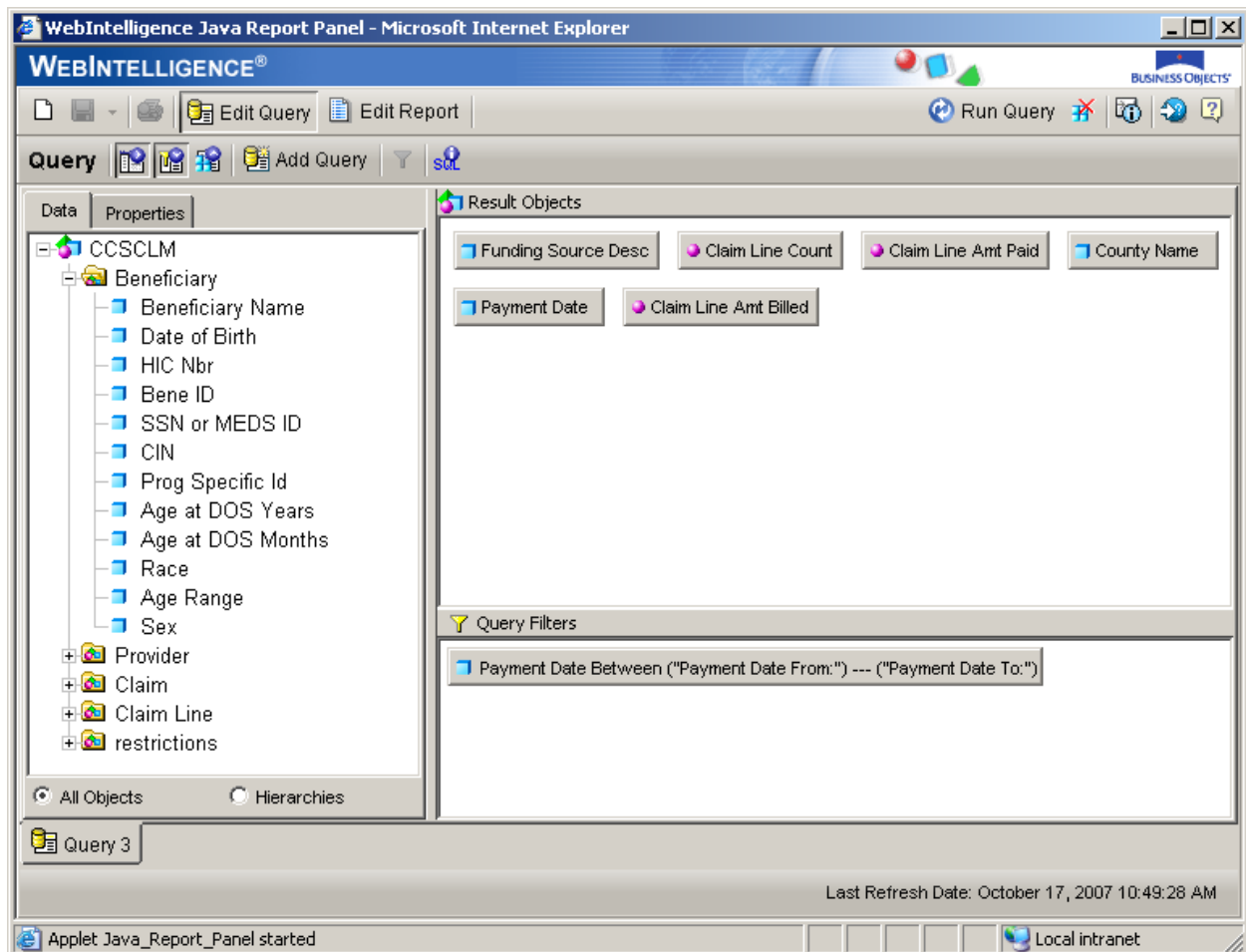
### CCS-ONLY

Beneficiary Name	Aid Code	CIN	Pr Diag	Provider #	Provider Name	SAR/TAR	Claim Control #	Proc Code	Pmt Dt	Paid
CLIENT NAME	9K	CIN	1707	PROV #	PROV NAME	97000999999	4355999999200	80053	1/3/2005	\$21.11
CLIENT NAME	9K	CIN	1707	PROV #	PROV NAME	97001000000	4355999999201	82248	1/3/2005	\$10.03
CLIENT NAME	9K	CIN	1707	ZZT40271F	PROV NAME	97001000001	4355999999202	82977	1/3/2005	\$14.38
Total:										\$322.07

## ***Paid Claims by Funding Source - Summary Report (by Payment Date)***

Count of number of claims and sum of total billed and paid by funding source.

Prompt: From Payment Date, To Payment Date



### Paid Claims by Funding Source

COUNTY

Funding Source	Payment Date	Claim Count	Billed	Paid
CCS-ONLY	1/2/2007	106	\$40,596.67	\$18,168.68
Sum:		106	\$40,596.67	\$18,168.68

Funding Source	Payment Date	Claim Count	Billed	Paid
HEALTHY-FAMILIES	1/2/2007	117	\$46,132.43	\$22,610.21
Sum:		117	\$46,132.43	\$22,610.21

Funding Source	Payment Date	Claim Count	Billed	Paid
MEDI-CAL	1/2/2007	1447	\$2,852,329.75	\$794,347.97
Sum:		1447	\$2,852,329.75	\$794,347.97

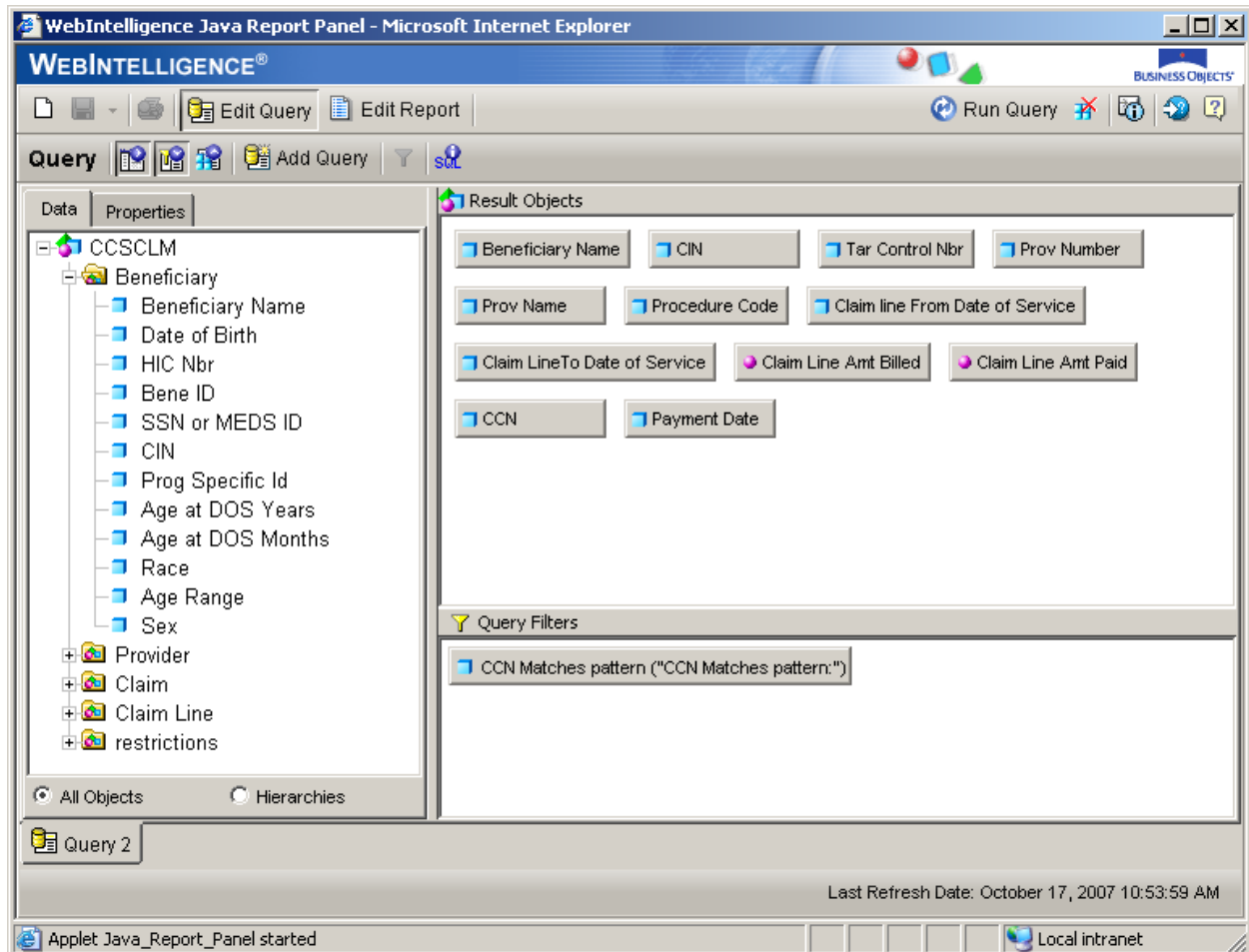
  

Total:		1670	\$2,939,058.85	\$835,126.86
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## ***Expenditures (by CCN)***

List of claims by CCN, then SAR.

Prompt: Claim Control Number (99999999999%; % returns all lines of the claim)



**Expenditures by CCN**

**LAST NAME FIRST NAME**  
**99999999A**

SAR/TAR	Claim Control #	Provider #	Provider Name	Proc Code	Pmt Dt	Frm DOS	To DOS	Billed	Paid
97000999900	6250609999900	PROV #	PROVIDER NAME	80048	9/18/2006	11/7/2005	11/7/2005	\$253.00	\$11.83
	6250609999901	PROV #	PROVIDER NAME	81003	9/18/2006	11/7/2005	11/7/2005	\$46.00	\$4.39
	6250609999902	PROV #	PROVIDER NAME	82803	9/18/2006	11/7/2005	11/7/2005	\$731.00	\$37.77
	6250609999903	PROV #	PROVIDER NAME	87088	9/18/2006	11/7/2005	11/7/2005	\$39.00	\$12.18
	6250609999904	PROV #	PROVIDER NAME	Z7502	9/18/2006	11/7/2005	11/7/2005	\$535.00	\$47.64
	6250609999905	PROV #	PROVIDER NAME	Z7610	9/18/2006	11/7/2005	11/7/2005	\$124.00	\$18.65
							<b>Sum:</b>	<b>\$1,728.00</b>	<b>\$132.46</b>
								<b>Total:</b>	<b>\$1,728.00</b>
									<b>\$132.46</b>